SEPTEMBER/OCTOBER 1991

PRACTICAL W[illegible]Y & VINEYARD

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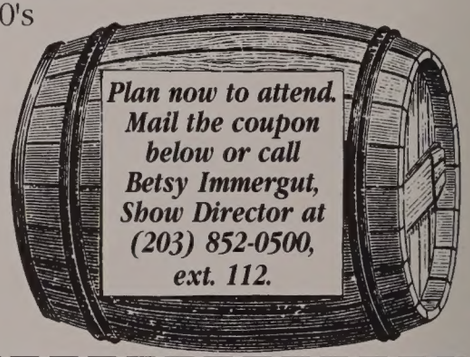

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FETZER'S TFT™ APPROACH

By Sid Goldstein, Fetzer Vineyards Director of Food/Wine Communications

Fetzer Vineyards has developed the Texture, Flavor, & Taste (TFT™) approach to food and wine pairing at their Valley Oaks Food and Wine Center in Hopland, CA.

Food and wine pairing is an intricate but ultimately instinctive craft. People choose mates based either on similarities to or differences from themselves. A painter makes the same kinds of choices in using colors — pastels are blended with each other to create a certain kind of effect, such as the technique used by French Impressionist painters.

A totally different approach is the way bold, contrasting colors are chosen by many modern artists to create a dramatic effect. Likewise, we make choices in using either ***similar*** or ***contrasting*** elements to link food and wine together harmoniously.

Texture

Texture is one of the least understood elements in food and wine pairing. The selection of similar or contrasting textures of wine and food provides a particularly useful connection.

Examples of textures include light, thin, and delicate or rich, oily, and dense.

Examples of textual ***similarity*** are osso bucco or hearty lamb stew matched with Zinfandel or Petite Sirah — a rich, hearty dish with a rich, hearty wine. Or loin of veal with gorgonzola cheese sauce and a barrel-aged Chardonnay — a rich, creamy dish matched with a rich, creamy wine.

An example of a ***contrast*** in textures is duck gumbo with andouille sausage with Gewürztraminer, Riesling or Gamay Beaujolais — a fatty, intense dish is refreshingly contrasted by a light, fruity wine.

Flavor

Flavor matching, on the other hand, is one of the most easily understood and common ways to pair food and wine. You either can select similar flavors or very different flavors.

Flavor examples include fruity, nutty, earthy, herbal, smoky, spicy, peppery.

Similarity is well-illustrated by a tenderloin of beef with a rosemary and Cabernet reduction paired with Cabernet Sauvignon — an herb-based dish with the herbal, fruity character of the wine. Or grilled snapper with lemon-dill sauce paired with Sauvignon Blanc — the citric, herbal-based dish amplifies the same flavors in the wine.

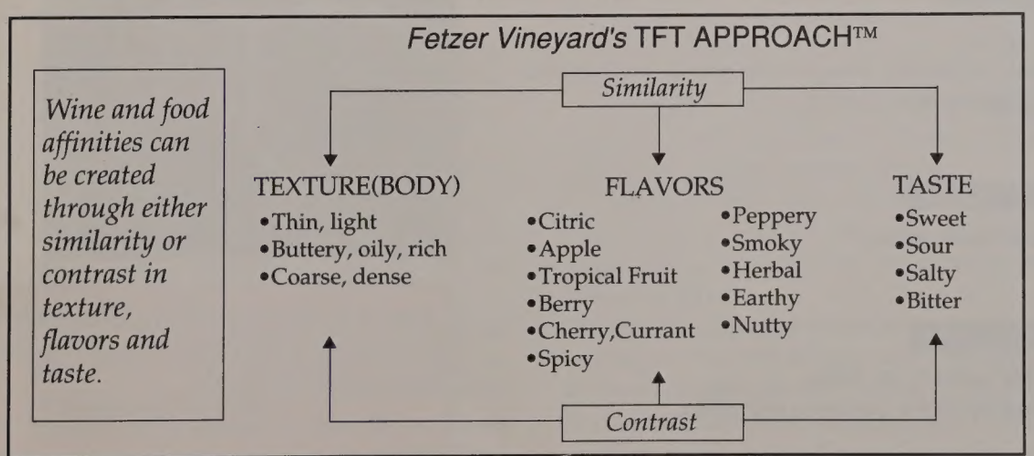
On the other hand, ***contrast*** is achieved by pairing prosciutto or smoked ham with Gewürztraminer or Johannisberg Riesling — the meat's smoky flavor contrasts the fruity character of the wine.

Taste

The four basic components of Taste are sweet, sour, salty, and bitter.

Similarity can be created by matching chocolate pâté with port — sweet with sweet. The chocolate pate and port connection also works because the bitterness of the chocolate is contrasted by the sweetness of the wine.

For ***contrast*** try raw oysters with Fume Blanc — the salty, briny quality in the oyster contrasts with sour (meaning tart acidity) in the wine; or Roquefort cheese with Sauternes or late harvest-style Riesling (salty cheese contrasts with the sweet wine).



Ten quick tips to food and wine pairing

1. High-acid foods (tomatoes, citrus, vinegar, goat cheese) are best suited to high-acid wines, such as Sauvignon Blanc and certain styles of Riesling, Gewürztraminer, Chardonnay, Zinfandel, and Pinot Noir.

2. Rich, fatty foods (duck, lamb, beef, cheese) match well with either slightly oaky white wines, such as Chardonnay, or with young red wines, such as Cabernet Sauvignon or Zinfandel.

3. Spicy, salty/smoked, and heavily-seasoned dishes are best contrasted by lighter, fruity, low-alcohol wines, such as Sauvignon Blanc, Gewürztraminer, Johannisberg Riesling, Gamay Beaujolais, Pinot Noir, and lighter style Zinfandel.

4. The texture (body) and acidity of the wine are as important to matching it with food as its flavors.

5. Great food and wine combinations come not only from matching flavors, texture, and taste components, but also in contrasting them.

6. Foods with some sweetness are best paired with wines of similar sweetness. If the food is sweeter than the wine, it will make the wine taste dry, astringent, oaky, and/or tannic.

7. Generally, wines should follow in a natural progression from dry to sweet; however, if a dish with some sweetness comes early in the meal, it's best to serve a sweet wine with it.

8. Obvious opportunities for food and wine pairing occur when a specific wine is used in the cooking process, such as in a marinade or sauce. The table wine will then tend to mirror the dish.

9. Successful food and wine pairing is highly subjective and individualistic — more an experimental, dynamic art form than a science. Don't be afraid of following your own instincts since there are **no** rules for right and wrong.

10. Most importantly, the food should not overwhelm the wine any more than the wine should overpower the food. Ideally, the result is synergistic: The two together are far more enjoyable than either the food or the wine by themselves. In this most imperfect world, enjoying great food and fine wine on the table with good friends and loved ones is one of our purest pleasures. ■

Fetzer Vineyards provided the "Celebrate the Seasons" artwork for the **PWV** *cover from their recent on-premise promotion of the same name.*

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EDITORIAL
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15 Grande Paseo,
San Rafael, CA 94903
415/479-5819

EDITOR
Don Neel

ART DIRECTOR
Diane Cobb

ASSOCIATE EDITORS
Tamara Croyts
Stan Hock

CONTRIBUTING EDITORS
Eleanor Heald
Ray Heald
Carol Shelton
Bruce Zoecklein

CONTRIBUTING WRITERS
Ken Arthur
Don Blackburn
R. Corbin Houchins
Millie Howie
Jay Conrad Levinson
Jake Lorenzo
Julie Morrison
George Schofield
Dr. Wells Shoemaker
Rhoda Stewart
David Storm

ADVERTISING REPRESENTATIVES
Wettstein, Nowell & Johnson, Inc.
415/472-5400
Fax:415/472-6835

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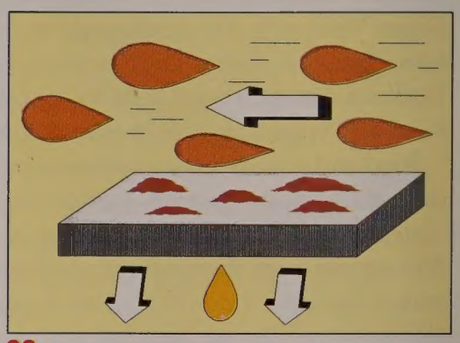
Celebrate the Seasons; from the earth to the table.
Artwork provided by Fetzer Vineyards from a marketing promotion.



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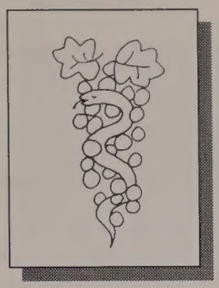
"Wine is the alcoholic beverage that offers the consumer a connection to nature in this plastic, high-tech society."
Paul Draper, winemaker/CEO
Ridge Winery



Wells Shoemaker, MD

Underage drinking— an unconventional view from a pediatrician

PREMISE: *Children who develop a balanced view of drinking by observing responsible models and trying alcoholic beverages in a safe and traditional mealtime setting will be less likely to endanger themselves and others by impetuous consumption as young adults.*

Alcohol abuse by teenagers represents a serious national health concern. Drunk driving by teenagers who are inexperienced with both their vehicles and their intoxication threatens every American.

Many individuals and several agencies respond steadfastly to this complex challenge with a "Just Say No" bumper sticker. Others advocate toothy legal measures designed to keep alcohol out of the hands of minors. These simplistic and naive postures, regrettably, never could and never will intercept this problem in a resourceful population notoriously difficult to control by authoritarian measures.

Real and lasting solutions for adolescents, as usual, start with an understanding of the problem and candor regarding our own limitations, rather than self-righteous pronouncements.

A critical first step separates adolescents suffering the early manifestations of lifelong alcoholism from those individuals getting into anecdotal trouble with alcohol because of convergence of social and environmental circumstances.

The disease of alcoholism does not start abruptly at any specific age. The genetic and metabolic determinants are present at birth, with subsequent environmental influences playing a significant but minority role. The disorder expresses itself when vulnerable individual and abusable substance come together — usually in the early teen years.

Many teenage abusers are destined for still greater problems as adults. Failure to respond to biological and social cues is the central characteristic of alcoholism in any age group, but the price can be quickly and grievously higher in a person who has not completed an education nor mastered a stick shift.

Teenage alcoholics, in my observations of children and society, may be the most scandalously underserved sick people in our country. We are transplanting hearts into newborn babies and building $100 million hospitals for children with enzyme abnormalities, yet even most pediatricians treat teenage alcoholism with some form of scolding.

Science and society are a long way from solving alcoholism, but there is an additional important dimension to the teenage drinking problem: that is the **non-alcoholic teenager who consumes alcoholic beverages foolishly** because of peer influence, developmental exploration, or independence symbolism.

Here, society has a perfect opportunity to make preventive and constructive changes; however, we're blowing it in the USA. By using strict and dogmatic prohibitions, our society sets up alcohol as a 'forbidden fruit,' granting it an air of mystery, intrigue, and desirability far more compelling than any advertising campaign could ever accomplish.

Furthermore, it's simply stupid to think that any harumphing bureaucrat is going to deprive teenagers of access to ethanol, no matter how satisfying the words may sound on the political podium.

A wiser approach will teach young adults how to consume — *or how to abstain* — responsibly and comfortably in the real world.

Learning involves both didactic and experiential components. Schools and books can describe the historical use of alcohol in past and present civilizations. Differing cultural and religious attitudes about alcohol expand a young person's awareness beyond his high school peer group.

Objective understanding of the biological effects of alcohol and the sociological effects of intoxication will help to form a base of knowledge without moral absolutism.

The most influential teaching force, however, is the consistent behavior of the adults close to the young person.

I wish to insert my own parenthetical experience. At age 19, I had the precious opportunity to study for six months in Florence, Italy.

I left a California environment where 'scoring' a six-pack of beer was a real goal of many classmates and where the spoils had to be consumed surreptitiously. One couldn't really bring the beverage home, so all containers were emptied, often in dumb places. Most often, a car trip separated the drinking location from the safety of bed.

In Italy, by contrast, a wine bottle sat on the table as part of the meal. Students could talk with each other and discuss things with a professor or an artist or a guest from the community. The wine sat there as an unpretentious bystander, matter of fact, take it or leave it, along with the bread, the grated cheese, the water glass, and the spoons.

Certainly, my Italian peers were interested in the same pursuits as the Californians — sex, speed, and amazement — but there was no impetus to abuse alcohol. There was just no novelty in going behind the stadium to drink and act stupid, anymore than one would sneak out to furtively gobble up the *panini* rolls which were always there for the asking.

As a happy corollary, there was less mental haze to interfere with the appreciation and the safety of the sex, speed, and amazement, if one were fortunate enough to find them.

This pediatrician's recommendation:

First I need to say that parents who use alcoholic beverages abusively may have given their children not only the genetic predisposition but the behavioral model to follow their path. This situation may apply to 5% or 10% of American households. My comments are addressed to the other 90%.

If parents use alcoholic beverages in moderation, I suggest occasionally offering small portions of wine or beer to young adults in a mealtime setting. Young people will know what the beverages taste like and discover that they are not magic keys to super powers or mystical vision or sexual conquest. They are simply part of a moderate, family meal.

The matter-of-fact approach, coupled with the consistent model of moderation, strips away the adventurism which can lead impressionable young people to drink foolishly away from the safety and grounding influence of the home environment.

This honest and soundly-based pediatric opinion is nonetheless probably illegal in many states, offensive to some of my pediatric colleagues, irritating to columnists who confidently deal with sloganistic absolutes, and stridently inflammatory to any agency dominated by the zeal of reformed alcoholics.

Legal threats, price barriers, availability restrictions, moral retribution, and scold-

ing will never curtail **abuse**. These measures may reduce consumption by compliant adults, who do not represent a threat in the first place, but if they have any effect upon teenagers, it may be to aggravate the problem and ostracize those who need help.

It's not an original thought, but if I had my way, I'd raise the driving age to 21 and lower the drinking age to 16 - and keep the government out of my dining room. I think we would live in a safer, quieter world. ■

Dr. Shoemaker is a pediatrician in Santa Cruz, CA, and owner of a small winery. One of his consistent themes has been to separate the disease of alcoholism from the issue of responsible use of alcoholic beverages by healthy people. A second theme is the need for the alcoholic beverage industry to lend credible support to research and education to abate the impacts of alcoholism upon individuals, families, and society.

Editor's Note: Dr. Shoemaker's experience in the worlds of both pediatrics and winemaking provides to him an important perspective on the issue of underage drinking. **PWV** believes his viewpoint deserves public exposure, although Dr. Shoemaker's personal opinions do not necessarily reflect those of **PWV** or its advertisers.

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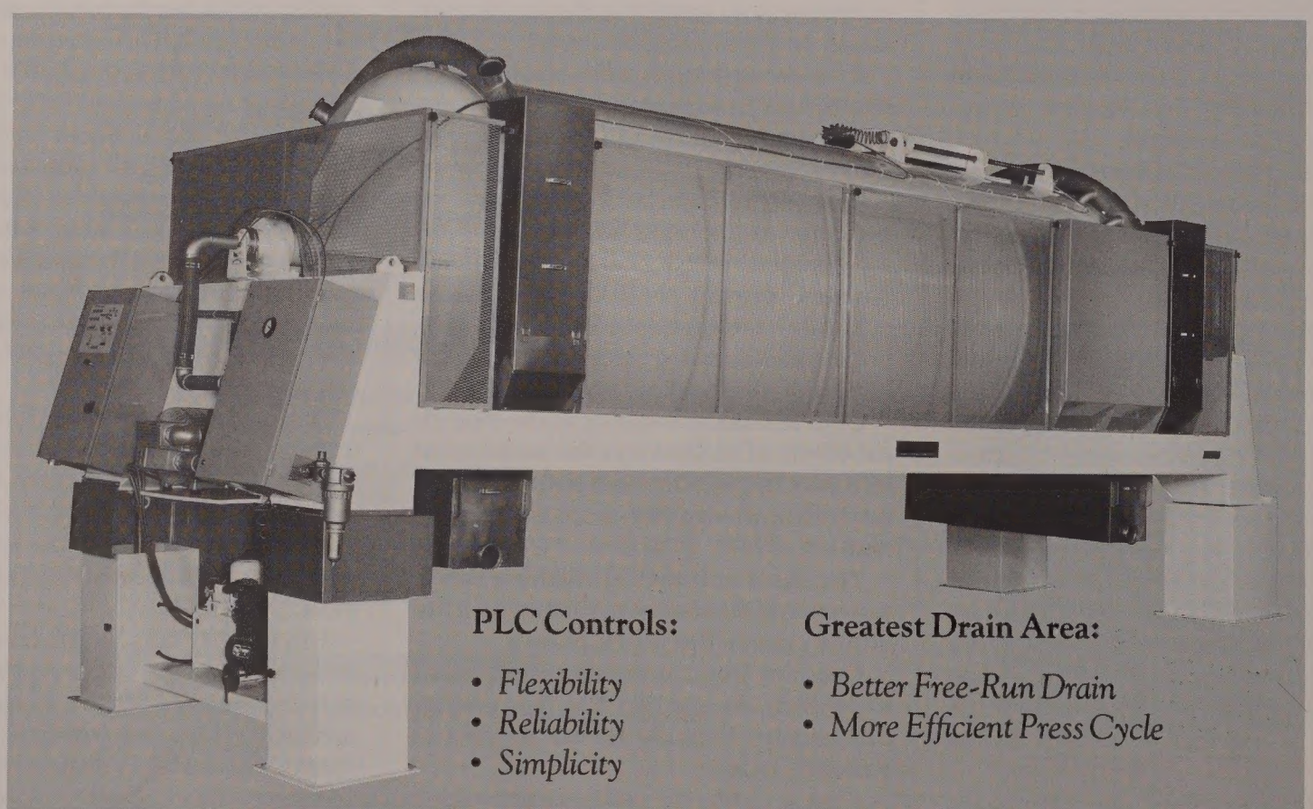

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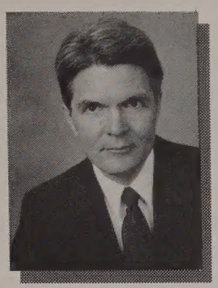


R. Courbin Houchins

More hurdles

Patchwork of regulations

Governmental regulation of marketing is one of those shall-I-laugh-or-cry phenomena. If it didn't have such adverse economic consequences, the frequent absurdities might offer more comic relief.

A microbrewery client, as much bemused as dismayed by the advice he was receiving, once created a table tent with some of his favorite compliance strictures from past and present drinking laws. It noted that in one state the consumer had to stand while consuming the product, in another to sit down; that various jurisdictions restricted music or dancing; that at least one town had attempted to forbid playing baseball after drinking beer; and that another had required the wife's written permission before giving free beer to a married man.

Entertaining as the point-of-sale piece was, each of the cited rules illustrates a real problem in promoting wine as an accompaniment to popular recreational activities. My editor recently passed along a complaint by the owner-operator of a small winery. The vintner reported that when he poured samples at popular public events, people would ask to buy a bottle, but the laws in his state forbad it.

One can imagine the reaction of potential new consumers to being told that the law protected them from the folly of actually purchasing the wine they had just sampled. At the very least, it reinforces the efforts of private groups to peddle the idea that wine consumption is a vice. No doubt it convinces many that becoming a wine consumer isn't worth the trouble.

Management strategies

What can wineries do about the patchwork of legal limitations on sales away from the winery premises?

Foremost, I think, is a business rather than a legal response: Don't get used to it. A constant problem in regulated industries is atrophy of creativity.

Because the law restricts availability of liquor, industry members tend to accept reduced channels of commerce as normal. If it would be good marketing for you to have your product available for case sales at events away from the winery, don't be too quick to accept 'common knowledge' that it can't be done. Close examination of the law and some imagination might find a way to accomplish your purpose in some markets.

Typically, sales and sampling at events like wine festivals or civic celebrations are done pursuant to a special event license issued to the sponsor of the event, which usually is not a regular beverage licensee.

The winery license that permits sales to consumers is normally limited to the winery site, so if you are going to make any sales in connection with an event held elsewhere (even, perhaps, on your own property), the legal concept will probably be as a manufacturer's sale directly or indirectly to the holder of a retail license.

Choosing the best license

A threshhold question is what kinds of retail licenses might be involved.

In some states, events might operate under several different licenses or permits with different privileges. Frequently they are temporary licenses issued for a specific function, but in some cases a regular retail licensee may be allowed temporarily to exercise its restaurant or bar license at the event location. Your marketing plan might include working with the event organizers to seek the best kind of license and determine who should hold it.

All the issues involved in distribution arise from sales to retail licensees: Can you sell directly, or must you go through a distributor? If a temporary licensee has to buy at retail, can you sell at a special price from your tasting room?

To spot the issues, review your objectives with your legal adviser. If the plan is at all unusual, it may be best to go to the regulatory authorities with a well-supported presentation showing that it is legal.

Unfortunately, involvement of a retail licensee raises tied house questions under laws that were not written with special events in mind. Can your employees staff the sales location, possibily as temporary workers for the licensee, or will that be regarded as illegal assistance to a retailer?

If the temporary licensee is going to buy from you, can it be a case or even a bottle at a time at the premises, or must there be an order in advance? If the latter, what happens to unsold product when the event is over? Consignment sales to retailers and promises to repurchase slow-moving stock are illegal virtually everywhere, but in most states there are methods of disposing of the stock of retailers that go out of business.

Will the regulators help?

Finally, it may be feasible to seek changes in the law at the regulatory level.

Most state statutes give the administrative agency considerable latitude in defining license privileges. There may be no policy objection to allowing wineries to use the special event as an occasion to sell. On the other hand, there is a regulatory tradition against sales away from permanent places of business, reaching back to pre-Prohibition animosity toward peddling beer off a wagon. A petition to amend the regulations may have to be prefaced with a selling job.

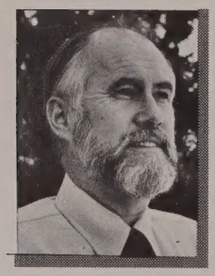
Note on the Domestic Small Producer Tax Credit

You may recall that upon adoption of the new federal excise tax (FET) rates, a key part of the political compromise, the credit to small domestic producers, appeared to violate U.S. treaty obligations under the General Agreement on Trade & Tariffs (GATT).

At press time, GATT had granted a request by Canada, with the support of the EEC, Australia, and New Zealand, for an investigation of the FET small producer credit as a preference forbidden by the multilateral trade treaty. There is speculation that Canada will file a formal complaint challenging not only the small winery tax credit, but a range of special treatment accorded local producers and wholesalers by state laws.

Although it looks like a long shot, the potential exists for freeing international marketing of wine from some of the hodge-podge of regulations and wholesaler-interest legislation. If that should occur, the resultant easing of national marketing could be ample compensation for whatever advantages the imports might pick up.

Meanwhile, plans are afoot to revise the FET rate structure by legislative amendment. Some kind of change appears likely in the current Congress, so projections and plans based on the current small producer credit system may well be academic by the time you read this. ■



D.R. Storm, Ph.D, P.E.

Petite Sirah and the Springfield College connection

Before 1991 draws to a close, I am compelled to highlight an unusual connection between the game of basketball, an 85-year-old Petite Sirah vineyard, and a remarkable woman named Aida.

Even if you aren't a fan of basketball, it would be very un-American not to recall the history of the sport, which began humbly at Springfield College in Massachusetts 100 years ago. Sports historians have described how a peach basket nailed to a gymnasium wall, and a well-worn volleyball, became the precursor of the run, shoot, leap, and dunk game of the 78- to 84-inch-plus giants who dominate the game in this, the year of its centennial celebration.

Basketball's inventor was James Naismith, P.E. instructor and later 19th-century University of Kansas basketball coach. The 1980 slant on the game's origins involved the then 103-year-old grape grower, Aida Naismith, first cousin-in-law of James (she married Welland Naismith, like James, a late-1800s Canadian immigrant to the U.S.).

In 1979, we at Winters Winery rediscovered Aida's vineyard in Northwestern Yolo County, and for eight years nurtured the 4.5 acres of Petite Sirah, producing some award-winning vintages from the struggling, unirrigated vinifera. Aida and Welland had planted the vineyard in 1903, not long after a late-1890s phylloxera epidemic destroyed every grapevine in Yolo County's Capay Valley.

After enactment of the 18th Amendment, Aida focused marketing of her wine grapes on Canada. In a conversation with me, she described how the grapes were shipped by railroad to Canada where wine was produced and bootlegged back into the U.S.

On one occasion, during my questioning about her Naismith connection, Aida said that a post-wedding train trip to visit Welland's East Coast relatives put her at the same dinner table with the now historically-famous James. Aida had a very long life, all of it spent close to the soil and farming. She died in 1988 at the age of 103, missing by only three years the chance for celebrity status during basketball's 100th anniversary celebration.

CONTRACTORS — OWNERS — DESIGN PROFESSIONALS

Harmony or discord in the construction process

Building it

From the simplest residential construction to the complexities of the 'smart skyscraper,' the interests, goals, and responsibilities of the three main players in any construction effort become intertwined and tangled, as weather, equipment delays, unmanageably short construction periods, and post-contract award design changes exert their respective influences.

Wineries present special problems for all parties to the process. For the designers, each winery and its utility systems are **different**. Each owner has a special need to get the winery into production at the earliest possible time (regardless of agency approvals, delays, or other natural bureaucratic stumbling blocks) with the least expenditure of capital funds. And the contractors, like the designers, are building a structure that is probably unlike anything they have ever built before.

Competitive bid vs. negotiated contract

Negotiated contracts are almost the rule in contemporary winery construction, at least in the California experience. The negotiated contract also sometimes is called construction by "source selection." The benefits to owners of negotiated over competitive bid contracts appear to be:

a) Screening out builders with little winery construction experience to focus on a selected list of contractors with proven winery construction track records;

b) Avoiding the 'low-ball' artists, who in a competitive bid arena, bid unrealistically low in order to get the contract with a pre-bid plan to make construction costs (and profit) by major post-contract award change orders;

c) Assigning a construction manager to assist the owner or owner's representative in processing the mountain of paperwork that accompanies construction. Together with the job superintendent, the construction manager expedites the macro- and micro-adjustment in effort (designers and contractors) to meet the completion schedule;

d) Agreeing upon 'guaranteed' maximum construction cost that will meet the owner's budget and not be exceeded. This also implies a guaranteed completion date.

Other alternative contractual arrangements include a design/build role for a construction firm which either has in-house design capability, or a contractor who creates a joint-venture entity with a reputable design firm to complete the project.

The basic philosophy of the main U.S. construction industry group, the Associated General Contractors of America (AGC), tends to want to avoid favoritism in contract awards.[1] Thus, the negotiated contract is not the arrangement of choice for the AGC. This is particularly relevant in public sector awards, where the spending of public monies is sacrosanct and competitive bidding for the most part is a requisite.

A frequent problem

Because many design professionals are not well-equipped by training to cope with the complexities of contemporary construction, they often retreat when faced with a construction difficulty with interrelated design implications. The designer knows what he wants the end product to be; he just often isn't quite sure how to achieve it.

It is at this juncture that the designer may lose some stature in the eyes of the owner, who is paying for his 'construction phase services.' It is at this time also that the construction manager and job superintendent can increase that sense of stature loss by failing to include the designer in the development of the solution. The solution is sometimes presented to the designer (who is not directly involved in the construction) as a proposal for review and approval.

It has been my observation that the historical concept of 'teaming,' which produces the three-headed construction management monster, seems to be fading. There has — and always will be — a certain amount of professional sparring and fierce competition among contractors and designers.

Thus, the construction manager has a balancing act to perform to prevent bruised egos and to cultivate the spirit of cooperation and team focused energy on the construction process. The most critical period for this working relationship is the discovery of a design oversight or serious design omission. Once the finger-pointing and counter-finger-pointing period is over, the designer has to stand tall, if it is indeed his/her error and with the help of the construction manager rectify the problem

quickly and cost-effectively.

A design change or contract change order usually results in extra cost for the contractor or his subcontractors. Often, it is difficult at this point for the contractor to remain objective, as the least costly proposal for the problem might be taking easily earned contract revenue directly from the contractor's pocket.

The special provisions of the negotiated contract covering cost extras, redesign review, and approvals becomes at this point, a very important aspect of the process. Timely submittals and reviews are a key performance parameter for all parties during this period.

The contractor's superior knowledge of construction should be given the proper weight in arriving at a design change proposal, but not control the other factors to be considered in reaching a decision for the best course of action.

The designer still has the right and obligation of redesign at his own expense; however, the need to remain on schedule often precludes the thoughtful weighing of best alternatives.

Room for improvement

In the past eight to 10 years, the role of the design professional in construction management appears to have been badly eroded. Much of the erosion can be attributed to an increased fear of liability exposure, and litigation by designers who must take the lead from their insurance underwriters and professional societies. It seems that the duties, responsibilities, and relationships of the designer, and either in-house, owner-construction manager, or contractor construction manager need to be more clearly defined.

Possibly the design should be involved in the structure of the owner-contractor agreement. This would allow the design team to evaluate and have input on those provisions which would either place them in professional jeopardy, or compromise their abilities to execute the design intentions in the best interest of the owner.

The designers and owners both should interview prospective construction managers. Prior to initiating construction, they should agree on the individual's qualifications and on ground rules upon which the three interests shall operate. These ground rules should be reduced to a written document.

Contractors are certainly at risk when they undertake a winery project, for all the knowns and unknowns that prevail in each and every design project. They, as well as the owners and designers, need to have protection.

The team approach, which seems to shrivel as the spectre of litigation gives any indication of its presence, needs to be reintroduced and encouraged as a cornerstone of good construction management. The construction industry, design professions, and a knowledgeable sector of one of the wine industry professional industry groups should give this matter the immediate attention it certainly deserves. ■

David Storm is a consulting civil and sanitary engineer and owner of Winters Winery.

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1. ***Negotiations vs. Sealed Bids***. Highway and Heavy Construction, Sept. 1990.

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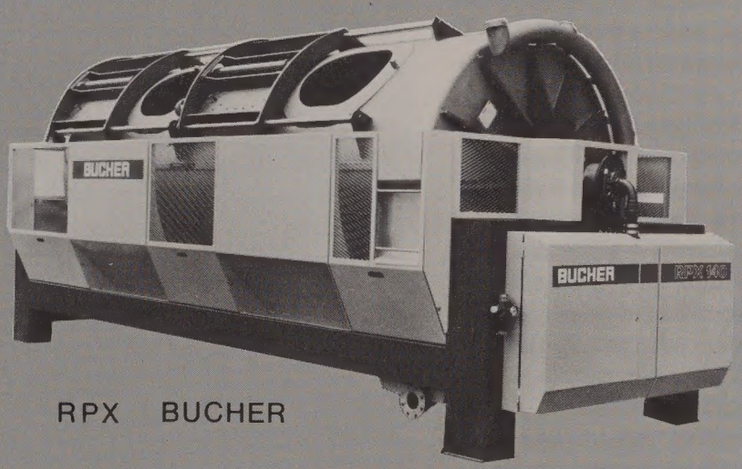

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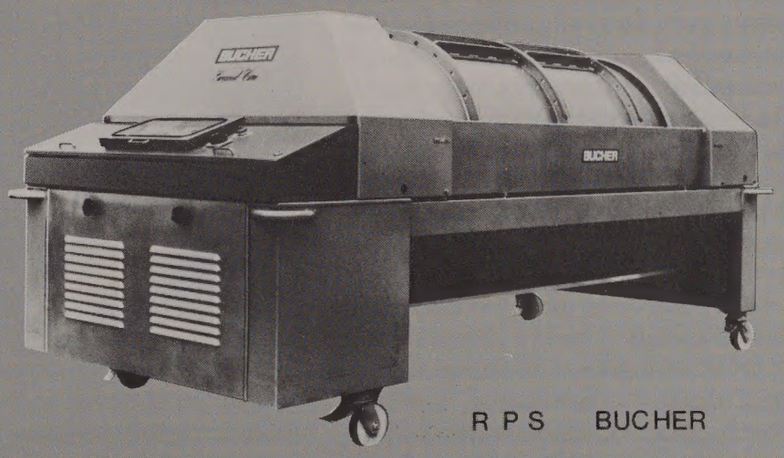

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METHODS AND STYLES:

3 CHÂTEAUNEUF-DU-PAPE ESTATES

By Robert W. Mayberry

Under appellation d'origine contrôlée (AOC) in France, the natural factors of production are the most 'contrôlée'. The regulations specify from exactly which grape varieties (cépages) an AOC wine may be produced, and in exactly which sites the grapes for an AOC wine may be grown.

The sites for AOC Châteauneuf-du-Pape are within a delimited area of plateau and slopes covering most of Châteauneuf-du-Pape and parts of four adjacent towns (communes) that share the same topography. The soil is mainly an ancient alluvial deposit of quartzite cobblestones, especially atop the plateau. (An exception to cobblestones is found on the slopes northwest of the village of Châteauneuf, which are covered by flat limestone rocks.)

The stones rest on a mixed marine sediment in which calcareous clay (north of Châteauneuf), sandy limestone (east of Châteauneuf), or gravel (south of Châteauneuf) predominates.

The region's mediterranean climate, dominated by the north wind (mistral), results in conditions of great luminosity during a long, hot, dry, windy growing season. The stoney soil is both highly reflective of light and heat, and holds a beneficial reserve of moisture below the surface.

Of the three estates included in this report, Château de Beaucastel is in the northern zone. Château La Nerthe and Domaine du Vieux Télégraphe are in the eastern zone.

Thirteen grape varieties are permitted in Châteauneuf-du-Pape. Production is limited to a maximum yield of 35 hectoliters (hl) of wine/hectare (ha) of land. The wine must achieve a minumum natural alcohol of 12.5%.

The regulations give more latitude on varietal proportions, choice of which is free, and to technique, referring only to vinification in either red or white according to 'local, loyal, and constant usage' from a 'perfectly healthy harvest.'

Châteauneuf-du-Pape
Domaine du
Vieux Télégraphe
APPELLATION CHÂTEAUNEUF-DU-PAPE CONTROLÉE
MIS EN BOUTEILLE AU DOMAINE
GAEC H. BRUNIER ET FILS, PROPRIETAIRES-RECOLTANTS
ROUTE DE CHATEAUNEUF-DU-PAPE 84370 BEDARRIDES FRANCE
75 cl
TABLE WINE · PRODUCE OF FRANCE · CONTAINS SULFITES
IMPORTED BY
ALC. 11-14 % by vol.
KERMIT LYNCH, WINE MERCHANT — BERKELEY, CALIFORNIA
MIS EN BOUTEILLE DU CHATEAU
Château de Beaucastel
CHATEAUNEUF-DU-PAPE
APPELLATION CHATEAUNEUF-DU-PAPE CONTROLÉE
PRODUCE OF FRANCE
Sté FERMIÈRE DES VIGNOBLES PIERRE PERRIN
AU CHATEAU DE BEAUCASTEL COURTHEZON (Vse) FRANCE
750 ML
ALC. 13% BY VOL
IMPORTED BY Vineyard Brands, Inc. CHESTER, VT
SHIPPED BY ROBERT HAAS SELECTIONS, FRANCE
CHATEAU LA NERTHE
Chateauneuf du Pape
APPELLATION CHÂTEAUNEUF-DU-PAPE CONTRÔLÉE
Mis en bouteille au Château
37,5 cl
Château la Nerthe - Propriétaire-Récoltant à Châteauneuf-du-Pape - Vaucluse - France
PRODUCT OF FRANCE

As with all wines having an AOC, the natural factors cannot be changed at will by producers. This gives leading Rhône wine officials and producers confidence that the type characterics of controlled-origin wines, to the extent that they are determined by nature, are immune to market influence. Producers responding to the market (the 'human factors') can only change style.

But how far can style be altered without altering type? Can technology ever depart enough from local usage to be an entry point for market influence? More specifically, is it possible that producers who jump on technological and enological bandwagons in quest of market 'mind share' risk losing their type's immunity?

These questions are raised by an idea of high-tech red winemaking now gaining favor in the Rhône.

A trend

The trend in question replaces traditional vinification of whole bunches, lightly or partially crushed, and ageing in 'passive' wood, with a combination of destemming, tanks equipped for automatic punch-down (pigeage), extended maceration, and ageing in new-oak 'barriques.' (Destemming, post-fermentation maceration, and small-barrel ageing are common in Bordeaux, where barrique is the name of the local 60-gal barrel. Pigeage, with whole bunches, in vats, is common in Burgundy and the northern Rhône.)

Appearing to some extent in the northern Rhône, especially at Cornas, the new trend seems more evident in the south. That's because some big Châteauneuf-du-Pape estates, including Domaine de Beaurenard, Château de la Gardine (who began experiments with pigeage in 1986), and Château Cabrières, have just built the new technology into renovated wineries.

The tone was set by the new owners of Château La Nerthe, who completely restored the chateau, installed new stainless steel tanks, and returned to the old spelling of its name.

Château La Nerthe, Châteauneuf-du-Pape

Under its pre-1985 owners, "La Nerte" was a bastion of the `blockbuster' style from the post-phylloxera era, remembered by many in the trade as `traditional' Châteauneuf-du-Pape. (For the full chronology, see "Rhône Varieties & Rhône Styles," ***PWV*** Jan/Feb '90).

Exaggerated in "body, warmth, and color," this style was produced from 80% to 100% Grenache instead of the pre-phylloxera diversity of cépages. It lived on after World-War II as a relic of the time, before AOC regulations, when wine from Châteauneuf-du-Pape was sold mainly as a blending component to `doctor' burgundies. Grenache had been overplanted as the variety most favored by the blenders for this purpose.

Thus, under the old regime, "La Nerte" had 58-ha in vine, between 85% and 90% planted to Grenache; 5% to the ensemble of Mourvèdre, Cinsault, and Counoise; 5% to

Syrah; and 3% to Clairette.

Only under its new owners and new director Alain Dugas has La Nerthe's vineyard now passed through the first 'generation' of post WWII changes made earlier in the plantings at other estates. The idea behind such re-diversification is to restore Châteauneuf's wines to the finesse, bouquet, and longevity of the historically traditional, pre-phylloxera style.

By 1990, La Nerthe's planting of Grenache noir was down to 31.5-ha, within which approximately 1.5 were field-blended Picpoul blanc and Counoise. Mourvèdre was up to 10-ha, Cinsault to 3, Syrah to 11, and 0.5-ha of Muscardin had been added. The planting of whites stood at 2-ha of Bourboulenc, 2-ha of Roussanne, 2-ha of Clairette, and 1.5-ha of Grenache blanc.

These plantings represent some of all thirteen cépages permitted in the appellation except Terret noir, Vaccarèse, and Picardan. The vineyard, which is grouped or 'single' (as in Bordeaux), not dispersed (as in Burgundy), is partly onthe plateau, partly on south and southwest-facing slopes.

La Nerthe's approach to grape maturity is also the historic one for Châteauneuf-du-Pape, with help from the laboratory. Dugas looks for the moment to harvest just before over-ripeness. That's when an elevated degree, usually above 14% alcohol, is still in balance with good acidity. For this purpose, tasting the grapes can provide a clue, especially for the ripeness of tannins. But Dugas gives priority in the decision to analysis of sugar, acid, and pH.

In winemaking, however, La Nerthe's interest seems less in restoring local practices than in being 'state of the art.' In effect they have passed directly to a second post-WWII generation of technical changes. A good many of these changes are incorporated from other regions that produce wines in a recognizably 'world class' or international style.

At "La Nerte", the grapes were crushed and piston-pumped, with the stems on, to cement fermenters (a system that appeared at Châteauneuf in the 1920s). Destemming began on 50% of the 1985 production, still made with the old vinification.

In 1986, the incoming bunches were passed by a conveyer belt to a crusher-destemmer and 100% destemmed. The grapes were then moved by a rotative pump 'à olive' to 10 new stainless-steel, jacketed (at the height of the cap), bottom-heatable, 217-hl tanks, manufactured by a firm in the Cognac region. Four tanks are equipped for hydraulic pigeage, as originally made 'experimentally' for Jacques Puisais, president of the National Union of Oenologists.

ABOVE: Hydraulic pigeage tanks at 'La Nerte.' BELOW: Inside tank.

Photos by John Beuchsenstein

The amount of wine given pigeage — once/day, slowly, plus one pump-over — varies with conditions of the vintage. None of the 1987 wine was punched down. In 1989, 50% of the normal cuvée of La Nerthe was Syrah/Grenache and Grenache/Mourvèdre co-fermented in the pigeage tanks. This part was aged an average of eight months in new to two-year-old Tronçais oak barrels. The other components were aged in large barrels (foudres) or saw no wood at all (e.g., the Cinsault).

1989 Cuvée "Les Cadettes" (old-vine Grenache, Mourvèdre, and field-blended Picpoul blanc) was 100% punched down and aged 12 months in 60-gal barrels. (The old-vine Grenache has excellent pH, according to consulting oenologist Noël Rabot.) "Clos de la Granière", now La Nerthe's name for a cuvée from younger vines, is not punched down and is aged only in foudres.

Primary fermentation plus maceration (cuvaison) lasted 20 days for the 1989 components that were punched down, 20 to 24 days for those that were not. Fermentation begins slowly, "for glycerol," then is allowed to rise to 30°C for two days just before the sugar is finished. Maceration is allowed to continue until, at some point after the 13th or 14th day, tasting and analysis of the tannins show it's time to press.

A pneumatic press is employed, but with "so much extraction", press wine is "less important" and is sometimes not incorporated. (The motive for such heavy extraction is perhaps explained by Patrick Brunel of La Gardine: It's new-wood ageing that "pushed us to make richer wines to fight the wood", he says. Others explain that extended maceration requires elimination of the stems.)

Malolactic fermentation is conducted in the 17th-century stone tanks beneath the Château (where in the old days the grapes were not destemmed and there was little crushing preceding a three-week cuvaison).

Diatomaceous earth (DE) filtration precedes the earliest possible barreling. Aerative racking is conducted barrel by barrel according to taste, usually only once. Much more important for oxygenation is ullage, amounting to the value of one glass of wine per barrel per week, using the 'bung up' (instead of the 'bung aside') system. After blending (assemblage) the wine is fined, DE-filtered again, and membrane-filtered at bottling.

Domaine du Vieux Télégraphe, (H. Brunier et Fils), Bédarrides

Henri and Daniel Brunier look at destemming 'the other way around.' To them, the stems in a traditional vinification give structure to the wine. Thus you would "have to compensate for their absence." The Bruniers conclude that the extra-long maceration and pigeage now typical of the destemming method are such compensating factors.

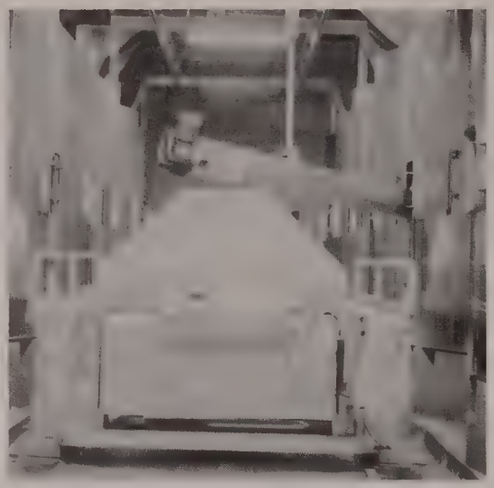
The desire to have a traditional vinification with stems governed design of Vieux Télégraphe's present installation, built in 1979 by a local firm according to the Bruniers' specifications for 'gentle' han-

dling of grape clusters. It clearly illustrates the main point of this generation of technical changes. Despite a modern look, the facility marks a return to pre-industrial winemaking practices.(Domaine du Père Caboche may have been the first at Châteauneuf to install equipment of this kind, followed by Château des Fines Roches.)

In particular, since breakage or scoring, together with underripeness, are the sources of objectionable, herbaceous stem flavors, the stems must not be damaged by must-pumps, hoses, or pipes. Vieux Télégraphe's solution was to eliminate them.

Thanks to the winery's hillside location, the hand-picked clusters arrive at second-story level in a shallow, 35-centimeter deep, stainless-steel lined trailer. There, they are tilted into a receiving gondola on rails that carry it high up between two rows of eight water-cooled, 150-hl stainless steel tanks.

An auger can empty the gondola to either side, into a mobile crusher. The crushing is light, leaving about 30% whole berries. Early on, Syrah and Grenache are cofermented; later it's Grenache and



Press and fermenters at Vieux Télégraphe.
Photo by Don Blackburn

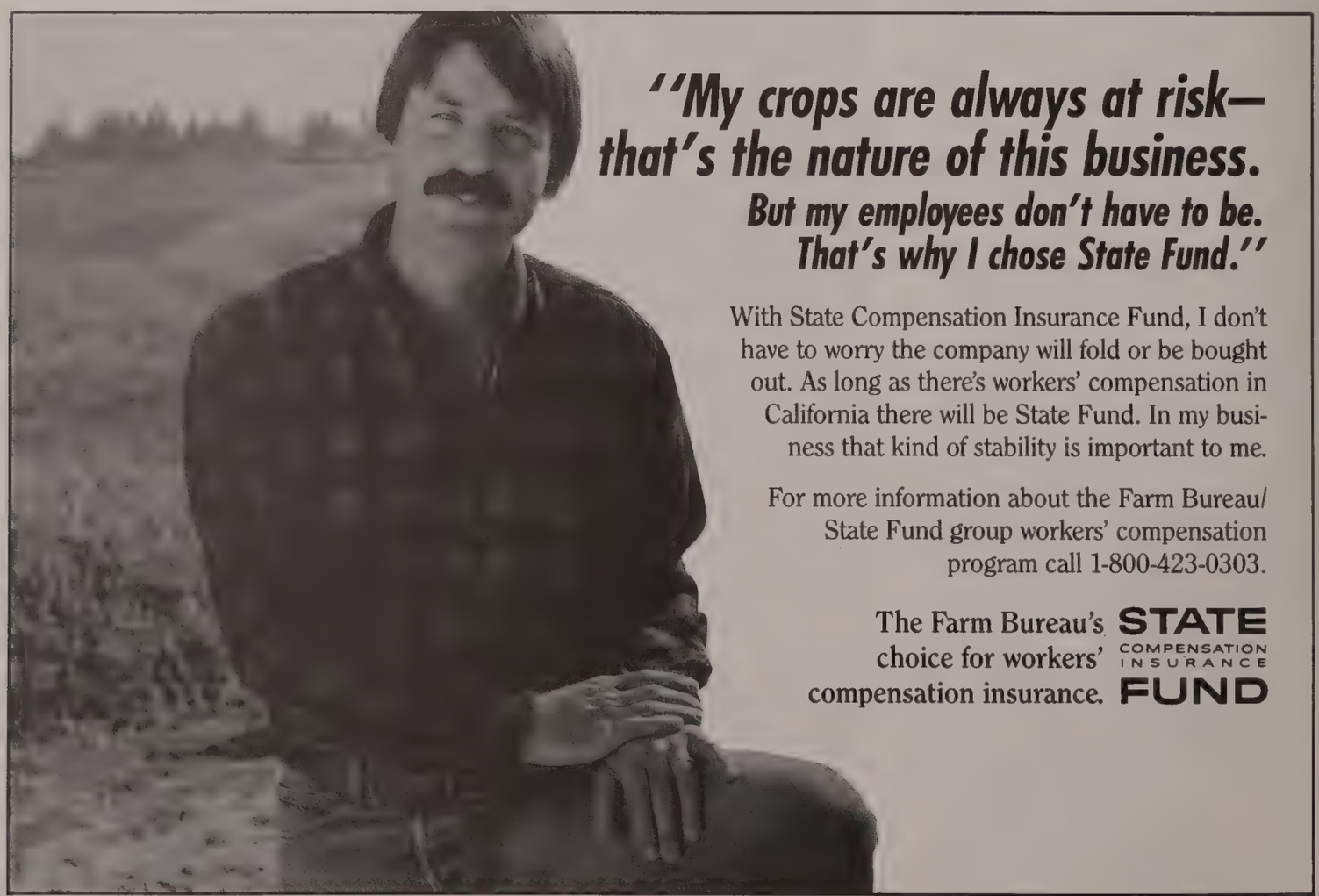
Mourvèdre. Cuvaison lasts a minimum of 15 days. Temperatures are held between 27°C and 33°C.

Henri Brunier and son Daniel, now winemaker, list the advantages of leaving the grapes on the stems in fermentation: The tanks don't get too hot, the fermentation doesn't have a sudden "burst of fire." (In the days before refrigeration, the traditional method was well-suited to winemaking in a hot climate.)

There is also better temperature control, especially of the cap. The cap is less permeable and has to be broken up if it's just made up of skins. (Again the pattern of 'compensation' by the newer technology for absent traditional practices may hold. There's the cooling-jacket at cap-height in the new tanks, and the punch-down mechanism is built to cut the cap as the mechanism is raised to the top of the tank before pigeage.)

With stems you have better drainage through the cap when you pump over to keep it moist — once a week with air, once a day without, at Vieux Télégraphe. There's better circulation in the vat, better aeration for multiplying the yeast — aeration which may also have beneficial flavor implications. (One proposal is that a floral-pollen-honey-beeswax family of flavors may be 'noble' oxidations resulting from vinification with the stems.)

Since 1982, the Bruniers have used a pneumatic press, to avoid any risk of damage even to stems in the pomace. The press, on tracks set into the floor at ground level, travels in the aisle between the two rows of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tanks. It is emptied by gravity directly into two 100 hl tanks below the aisle floor.

Press wine is incorporated with the free-run as soon as any remaining sugar is fermented. There's a "mini-assemblage" at the time of each of three or four rackings thereafter, with a DE-filtration just before the final assemblage of Vieux Télégraphe's "one wine" in May or June.

In September, the wine is put in foudres for seven to nine months maturation in wood. (When the Bruniers replace an old foudre, the new one touches no Châteauneuf-du-Pape before the taste of new oak has been removed. For this purpose, they first use it to hold the 'râpé,' a vin ordinaire compulsorily made under AOC regulations for a healthy harvest by culling out excess, underripe, rotten, and damaged fruit.) Because the wine can evolve differently from barrel to barrel, there's a further assemblage of three or four foudres for each bottling. Since 1987, there has been no filtration at bottling for either European or American clients.

First generation restorative changes are solidly in place in this single estate's 60-ha vineyard, partly on a plateau and partly on east-facing slopes. In 1990, the planting of red varieties was 72% Grenache, 10% Syrah, 10% Mourvèdre, and 8% Cinsault. About 8% of the vineyard is in white varieties, Grenache blanc, Clairette, Bourboulenc, and Roussanne.

Experience leads the Bruniers to aim more and more toward a crop-level for optimum quality that is different for each cépage. Vineyardist Frédéric Brunier now recommends a yield of 20 hl/ha for Cinsault, 30 for Grenache and Mourvèdre, and "to the limit" for Syrah.

(The 35-hl/ha limit on yield for AOC Châteauneuf-du-Pape can be exceeded by no more than 20%, so long as any excess is thrown into the râpé. Exceed the 20% and the whole production, not just the excess, loses its right to AOC designation.)

A similarly experiential attitude is taken by the Bruniers toward grape maturity. The basic principle, according to Frédéric, as important to whites as to reds, is "to harvest very ripe but not overripe grapes —in order to have the true perfumes of the terroir." Overripeness is graver for the quality of Syrah than for Grenache, which can tolerate a little. Mourvèdre has to be very ripe.

Visual clues play a great role, Frédéric says, especially for his father. Henri will see by the look of a parcel that the crop has reached a good maturity (Cinsault looks 'figgy', for example). Then it's time to take a sample to test for degree, acidity, and pH.

Proper use of lab data depends, however, on knowing that there are some parcels that are ripe at 14% alcohol, and others that aren't ripe until 15° or 16°, no matter what cépage. Nor is this just because these parcels are later to ripen — in fact, they're sometimes earlier.

Because the Bruniers vinify whole bunches, they also monitor maturity of the stems. Mourvèdre stems are more evidently ripe when the grapes are than are the stems of the other southern Rhône cépages, according to Daniel Brunier.

Frédéric goes further. Mourvèdre stems are 'lignified' (woody) when the grapes are mature. You have to wait for the stems to turn woody to ensure ripe berries. This is less true for Grenache and Syrah, where if you waited for wood you might get overripe berries. He says it is easy to wait too long for Syrah.

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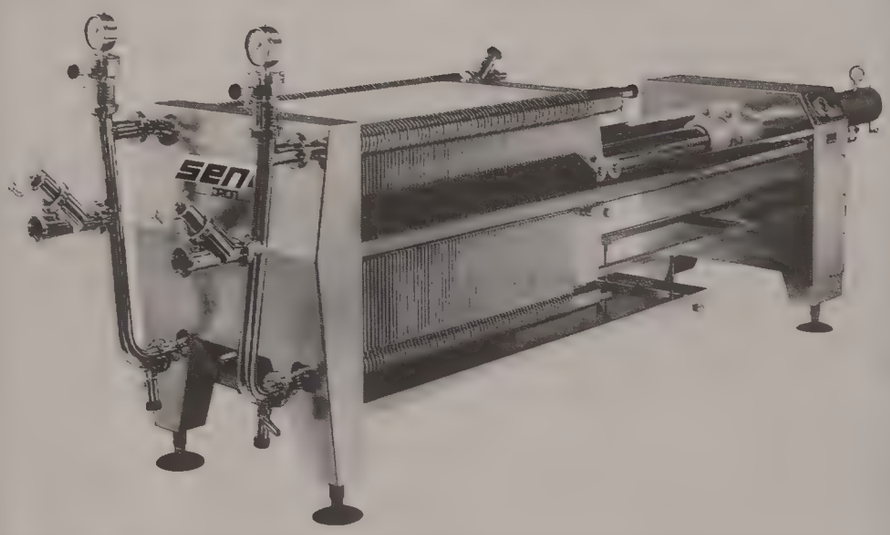

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Château de Beaucastel (Société Fermière des Vignobles de Pierre Perrin), Courthézon

Following the sequence of vintages at Beaucastel, we can see the effect on wine composition of perhaps the steadiest post WWII program of increasing the diversity of cépages, especially to bring back Mourvèdre. From a 1949 wine that was 90% Grenache, by 1989 the blend included 30% Grenache, 30% Mourvèdre, 10% Syrah, 10% Counoise, and 5% Cinsault.

The 70-ha vineyard of this large, single property is planted on 95% argilo-calcaire (clay-lime) soil. By 1990 the planting was 30% Mourvèdre, 30% Grenache, 10% Syrah, 5% Cinsault, 5% Counoise, and 5% Muscardin. The vineyard also includes 5% whites, of which 80% are Roussanne, 15% Grenache, plus Clairette, Picardan, and Bourboulenc — and 10% the rest of the permitted 13 grape varieties.

For winemaker François Perrin, visual and taste clues are both more important than analytical criteria for finding "the most ripeness possible just short of overripeness." His brother, Jean-Pierre, has described that state of maturity as "the most important factor of quality."

The numbers, including weight of the berries, volume of juice, richness in sugar, total acidity, and pH, "aid but don't explain," says François. For one thing, they differ in relation to the desired maturity from year to year.

François looks for the signs of readiness in color — of leaves, stems, and skins — and then tastes the grapes for a sweet taste with "harmony". "Beyond that, the sweetness is pasty," he says.

The Perrins approach the rest of their operation with the same "organic state of mind." "Vines are in a universe giving them everything they need," says François. The fertilizer is composted sheep manure and grape pomace. The point is "to nourish the life of the soil so that the soil can engender life in the plant."

Treatments must respect the life of the soil and are limited to Bordeaux mixture and sulfur dust, unless there is a serious risk of losing the whole harvest. The Perrins treat once against caterpillars, the vector for bunchrot, with plant-derived pyrethrins.

In vinification, their preference for several generations has been for physical means over chemical means to combat oxidation.

Certainly untrendy, Beaucastel's vinification is both unique at Châteauneuf-du-Pape and traditional to them. Some form of heating the grapes (vendange) has been conducted at Beaucastel since 1909, after François and Jean-Pierre's grandfather noticed that, compared to heated batches, unheated ones oxidized. Buckets of heated grapes used to be added to the crush; later some were passed through heated coils. The present heating system, patented by their father Jacques Perrin, has been used on the entire harvest every year since 1964.

Heating the grapes (physical means) is at once well-adapted to working with Grenache's natural susceptibility to oxidation, and reduces the need to add sulfur (chemical means). François suggests other advantages including increased color extraction, destruction of polyphenol oxidase, elimination of the need to innoculate with yeast, and liberation of nitrogen as yeast food.

Currently, after sorting, the grapes are destemmed by an "égrainoir" (separates

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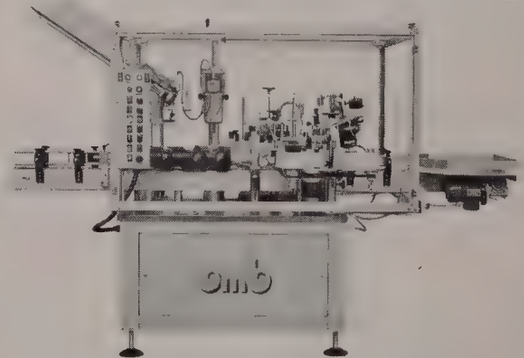

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berries from stems, not stems from berries), and are moved by a rotative pump through a stainless pipe toward one of 40 tile-lined 140-hl tanks. Jean-Pierre Perrin sees an affinity of spirit between those who use the whole-bunch method and Beaucastel's employment of such gentle destemming and pumping equipment.

"In a hot region, it's better not to destem than to abrade the stems," Perrin told the 1990 International Colloquium on Rhône Varietals, held under joint French/American sponsorship, in St. Helena, CA.

"In my climate and California's," he continued, "you have to handle grapes with a surgeon's hands. What's important is to use the most direct route to the tank, to avoid harming the skins. To asphyxiate the skins is the goal of all the methods."

Along the way to the tanks, the pipe passes through three heating elements. In these, the pipe rotates inside a steam-filled chamber between it and the outer jacket. This brings the grapes, during each of the three one-minute passages, to an interior temperature of 30°C, and the skins to 80°C.

Then the must passes through a heat exchanger for rapid cooling (within three minutes) to 20°C. The cuvaison, which begins cool and is held cool to prolong it, is allowed to rise to 35°C toward the end of the (average) 15 days. The different cépages are fermented separately. Similarly, the press wine, from a pneumatic press, is kept separate.

After racking-off and pressing, the wines are kept on the fine lees in tanks, without racking, until assemblage in January or February. In the blend, the separate cépages are the 'colors', the vintage is the 'painting.' All the Beaucastel paintings have a family resemblance, but the point of each is to "express the climate of the year," says François.

The goal of maturing the wine in wood "is to refine the tannins of the wine," which is why the barrels are foudres and not new. By the same token, old wood would `kill' the wine if it were kept in wood as a `recipient' and not "as a medium of refinement." So the wine is racked with aeration or not, according to taste; racked from barrel, by taste, after eight to twelve months; and held in tanks for a final assemblage before bottling.

After egg-white fining, the wine is bottled by gravity without filtration. Since 1980, when they increased their underground capacity for stock by 500,000 bottles, the entire Beaucastel lot of one vintage has been bottled at one time.

Some elements of an answer

Among these three estates, the general geography and terroir — particularities having been noted — are similar. So are real diversity of cépages, the goal of maximum ripeness, long cuvaison, and modern temperature control. Thus the answer to this report's opening question will probably depend on how our taste responds to two key differences of the new technology and the old.

Two of the estates are uncommon in destemming entirely. Of the key differences, perhaps the new technology's elimination of stems is second in importance. That's because the goal of eliminating negative stem flavors is shared both by those who destem and by those who leave the stems on and treat them gently.

The issue that remains is whether stems contribute positive, typical characteristics that will be lost if they are not employed. Among such characteristics that might be

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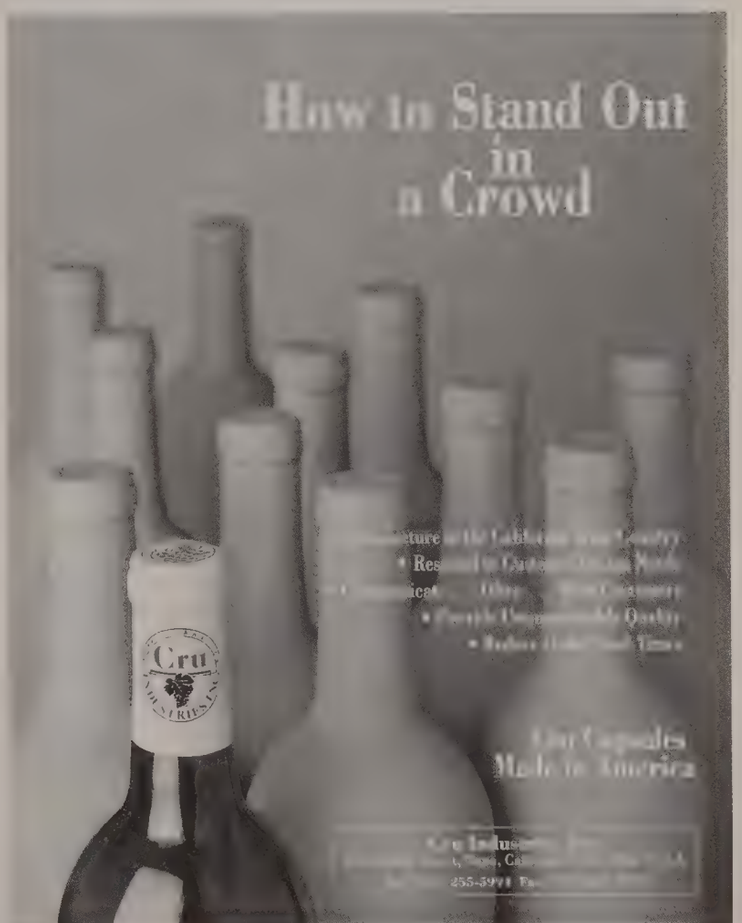

lost are structure, wooded flavors that are not from the recipient, and certain 'noble' oxidations.

The most important difference between new technology and old, I believe, combines the new technology's heavy extraction, including pigeage of some components, with the maturation of these in newer oak. In my experience of these components so far, there is certainly a concentrated taste of the skins, a distinct oak flavor, and less secondary (reduction) aroma than I have previously taken to be typical of 'fresh' Châteauneuf.

Even as an element in assembled wines, these components tend to delay the achievement of harmony and balance, especially of oak flavors and dryish 'feel' with the rest of the wine, until four or more years after vintage. At the three estates we have reviewed, Châteauneuf-du-Pape has always been treated as a type with a great capacity to benefit from age. Move more in the international direction and it could also become one, with its youth suppressed, that offers mainly or only the pleasures of its maturity. ■

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RESEARCH UPDATE

VITICULTURAL PRACTICES TO MINIMIZE PHYLLOXERA THREAT

By Grape Phylloxera Task Force: Jeffrey Granett, John DeBenedictis, Ed Weber, University of California

Recent research by the University of California indicates two possible origins of biotype-B grape phylloxera in California. We offer management strategies based on these ideas and a research agenda necessary for carrying out current and future management options.

Theories on origin of biotype-B phylloxera

The historical success of AXR-1 indicates it is likely that biotype-B phylloxera did not exist in California prior to the 1980s when it first appeared in vineyards which had been planted with mixtures of susceptible and resistant rootstocks. We hypothesize two possible origins of biotype-B: 1) It could have been introduced from outside California; or 2) It could have resulted from a mutation of biotype-A phylloxera.

'Introduction' hypothesis — Some phylloxera populations in the eastern U.S. and biotypes elsewhere in the world feed vigorously on AXR-1 roots. The free movement of rootstocks into California from the eastern U.S. and the possibility of illegal importations from outside the U.S. suggest that introduction of biotype-B into California is plausible.

'Mutation' hypothesis — Except for the significant difference between biotypes A and B in vigor on AXR-1 rootstock, all biological characteristics examined are extremely similar, suggesting a single lineage of phylloxera from which a mutant (biotype-B) arose. The specific random mutation of biotype-A into biotype-B is extremely rare, but as phylloxera populations increase, the probability of such a rare event increases.

Most researchers believe that phylloxera only reproduce asexually in California's viticultural regions. There are only females, each genetically identical to its mother. This limits genetic variability in California to the lineages that arose from introductions, and successful mutations of those lineages. Any mutation, including that of biotype-A to biotype-B is a very rare event. Most mutations decrease the fitness of the individual.

It should be possible to determine the genetic similarity of California and other biotypes by analyzing nucleic acids. This DNA-technology might indicate whether biotype-B is a recent mutation from biotype-A or was introduced independently.

Biotype-B is much more fit than biotype-A on AXR-1, but equally fit on most other root types. Whether a mutation or an introduction, the new genetic type of phylloxera was able to replace type-A populations on AXR-1 rootstock by feeding more aggressively and by multiplying much more rapidly.

We believe that biotypes can arise by either introduction or mutation. Protection against biotypes must take both mechanisms into account.

We cannot prove or disprove either hypothesis with present data. Whether by introduction or by mutation, the much greater vigor of the variant phylloxera on AXR-1 rootstock enabled it to increase its numbers rapidly. Since detection in 1983, it has caused significant losses in Napa and Sonoma counties.

Management recommendations

Our research suggests a general strategy for protecting vineyards and minimizing the threat of new biotypes from both introductions and mutations. We recommend preventing introduction of phylloxera into vineyards, keeping existing populations as low as possible, and minimizing the types of roots available at any site.

1. Sanitation — Human activity is responsible for long distance phylloxera movement and can spread phylloxera within a vineyard. New infestations can be prevented in remote vineyards and delayed in vineyards near existing phylloxera sites by controlling human activities.

a. Avoid moving contaminated soil or roots from infested blocks into and within your vineyard on machinery, tools, and personnel. Allowing only cleaned machinery and implements in your vineyards will help stop phylloxera hitchhikers.

Phylloxera eggs, nymphs, and adults can survive a week or two if they do not dry out. Soil clods remain moist for long periods of time and should be washed from equipment and clothing.

Phylloxera also move by crawling from plant to plant, with irrigation water and eroded soil, and by blowing in the wind. Although these mechanisms may be important for short distances, they are not important for long-distance dispersal.

Research is needed to determine the ability of the wingless and winged forms of phylloxera to spread naturally. The ability of the wingless forms to survive away from the plant and infest new plants needs investigation. Winged phylloxera are present in California, but believed to be incapable of laying viable eggs. This needs confirmation.

b. Do not bring rooted cuttings which may be infested with phylloxera into your vineyard. Cleanliness of rootstocks certified outside of California may be unreliable and bringing such materials into your vineyard is a risk. Direct importation from other countries is a great risk and is illegal.

Phylloxera can be killed on rootstocks by hot water dips prior to planting (***Grape Pest Management***, Flaherty, D.L., editor). Malathion (57% EC) is registered for this use but should be used only according to the label.

Phylloxera from the eastern U.S. and Europe are more variable than those in California, and some have characteristics which differ from those in California. It is possible that some of these genetically different types can reach destructive population densities on rootstocks that are highly resistant to the California biotypes.

Phylloxera can survive on roots that are soil-free and could easily be imported on rooted cuttings. Excluding exotic phylloxera from California is prudent considering the magnitude of the risk.

We must understand the variability of phylloxera world-wide in order to assess their threat to rootstocks and the need for quarantines and sanitary precautions.

2. Reduction of phylloxera populations — Mutation rates are extremely low and mutations that form new biotypes are extremely rare. However, such a remote probability increases when populations are high. Efforts must be made to keep phylloxera populations as low as possible.

Phylloxera have been observed on roots of resistant replants. Keeping populations low may improve the survival and growth of replants.

a. Remove vines that have easily detectable populations whether they show

damage or not. Vines should be removed by blocks for convenience of management.

b. Remove roots originating above the rootstock graft with the scion. Scion roots are susceptible and will support high populations.

From random sampling of an infested block, we know that phylloxera infest many more vines than those in decline. Vines with the most heavily infested roots may not yet show decline.

Removal of an entire block will eliminate these high populations, lessen the chances of mutation, and reduce the threat to replantings and neighboring blocks.

Some resistant rootstocks, such as St. George, may develop high populations of phylloxera, possibly due to stress or old age. In all instances of decline, phylloxera should be considered as a possible cause.

Conditions that promote and inhibit spread of phylloxera and the onset of decline need to be identified.

c. Consider use of soil insecticides to keep phylloxera populations low in infested vineyards. This may suppress populations and allow more orderly scheduling of removal and replanting.

Carbofuran is the only registered insecticide for phylloxera in California. Because soil coverage is often incomplete and penetration too shallow, especially in heavy soils, surviving phylloxera will enable the population to rebound. Another drawback is the 180-day pre-harvest limitation on use. Enzone, another insecticide, is being tested and is not yet registered.

Comparative field trails of insecticides under a variety of conditions are needed. Resistance to these pesticides needs to be investigated.

d. Consider soil fumigation after vine removal and before replanting. Removal of vines may leave behind many living root pieces which can support phylloxera.

Root pieces can survive in the soil for many years after the vine is removed. Soil fumigants will reduce the phylloxera populations on them.

3. Rootstock selection—Use rootstocks which have the highest level of resistance to phylloxera **and** suitable viticultural characteristics. In the past, University recommendations have considered viticultural characteristics of rootstocks to be of greater importance than high levels of phylloxera resistance. The appearance of biotype-B indicates that lower levels of resistance may be overcome with time.

Most existing rootstocks were bred or selected a century ago for European conditions. Many of these rootstocks are not appropriate for California growing conditions and modern viticultural practices, and many have not been field-tested.

Breeding new stocks in response to evolving pest pressures and cultural advances should be considered a permanent part of viticultural research. New rootstocks that are appropriate for California are needed. This requires a better understanding of the physiological and genetic mechanisms of phylloxera resistance.

Because the longevity of rootstock resistance to phylloxera and other diseases is unknown, continuous monitoring of long-term field trials of rootstocks is needed. These field trials should subject rootstocks to a wide variety of environmental conditions, viticultural practices, and exposure to phylloxera.

a. Do not plant own-rooted vines or AXR-1. Avoid 41B, 043-43 or other rootstocks which support high populations of phylloxera.

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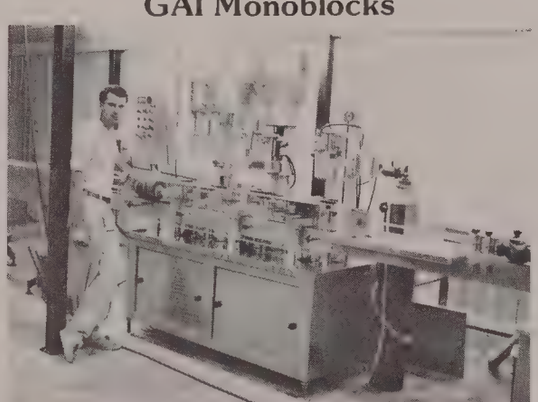

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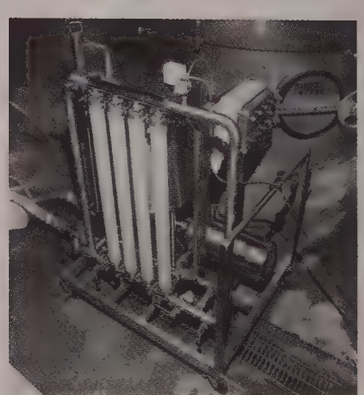

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Use highly resistant rootstocks such as SO4, Teleki-5C, 3309-Couderc, and others.

b. Avoid hybrids with low resistance and *V. vinifera* parentage. Only these rootstocks have failed previously.

Rootstocks with *V. vinifera* in their parentage and those that support low to moderate numbers of phylloxera are at risk from biotypes. AXR-1 and 41B rootstocks, which fell to biotypes, have a high proportion of *V. vinifera* in their parentages and were known to have low to moderate phylloxera resistance prior to their failure.

Rootstocks with low resistance or those that tolerate phylloxera, may be continously exposed to feeding and are more likely to succumb to new biotype introductions or mutations than those with higher resistance.

We need to know if the persistent feeding of phylloxera on low to moderately resistant rootstocks will eventually cause rootstock failure with or without mutation.

c. Know what you are planting, and insist on receiving certificates with rootstocks. Reliability and reputability of the nursery supplying the rootstocks is of **utmost** importance to assure receiving desired, disease-free rootstock.

Problems in vineyards have frequently resulted from planting the wrong rootstocks because of erroneous identification. Bench-grafted vines cannot be identified by ampelography, because mature leaves and shoots are not present.

A vineyard may also be threatened by uncertified diseased rootstocks. The certification program in California is designed to protect growers from misidentification and disease.

We must develop rapid chemical methods for positively identifying rootstock cultivars. Preliminary research on electrophoretic analysis looks promising.

4. Deployment of rootstocks — After selecting an appropriate, disease-free rootstock from a reputable nursery, develop a replanting program relative to existing plantings. These decisions will affect the growth of new plantings and potential for biotype formation.

a. Do not interplant or mix rootstocks within blocks. Remove the entire block of phylloxera-infested vines before replanting.

Interplanted vines are usually of a different age than the existing vines, and it is

Continued

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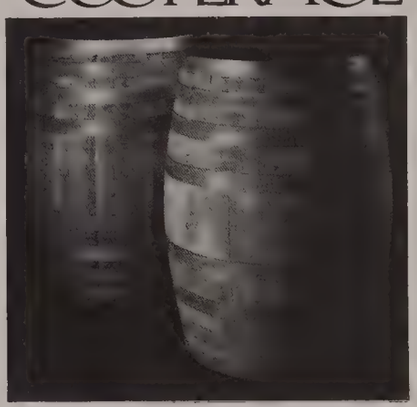

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viticulturally difficult and inefficient to manage a block with vines of different ages.

Each rootstock cultivar is best-suited to specific growing conditions, and site conditions are likely to be less favorable for some rootstocks in a mixed planting than others. Interplants will be attacked by phylloxera from the adjacent susceptible vines. These phylloxera will threaten the survival and possibly slow the growth of the interplants.

The high populations on the susceptible plants will increase the numerical probability that mutations will occur. Mutated individuals could then be amplified on roots of an interplant to form a new biotype.

b. Do not allow a rootstock block to have a common border with a highly infested block. Keep a space (roadway or fallow strip) between infested and newly planted rootstock blocks as a buffer against phylloxera attack from the infested block. Open spaces will tend to slow movement of phylloxera.

5. Escaped grape vines — Keep noncultivated host plants suppressed in the vicinity of vineyards. Escaped rootstock plants and *V. vinifera* should be removed or kept remote from vineyards.

Wild plants can be reservoirs for phylloxera which may infest vineyards. Wild rootstocks may promote selection of biotypes.

Research agenda

Additional research is necessary in support of these recommendations.

1. Positive identification of rootstocks. Verification of rootstock identities can prevent intermixing rootstocks. Preliminary research indicates that electrophoretic analyses will discriminate rootstock cultivars and enable identification when leaves or ampelographic experts are unavailable. This technology may be available within one year if support is attained.

2. Detection and characterization of existing biotypes. Long-term dependability is a prime concern when rootstock recommendations are made. One phylloxera population will not necessarily perform like every other one, so our confidence in rootstocks requires broader screening.

The detection of biotypes which can thrive on various rootstocks will enable us to make better rootstock recommendations. Bioassays should be done with phylloxera collected from a variety of hosts and sites throughout California and the rest of the U.S.

Rootstock successes and failures elsewhere in the world may presage performance in California. For example, in Europe a population was found that survived slightly better on 3309-Couderc in laboratory tests than all other populations tested, though it did not cause the rootstock to fail in the field. The search for biotypes should be extended to Europe, South Africa, Chile, Australia, and New Zealand.

3. **Determination of resistance mechanisms.** Knowledge of the physiological and genetic mechanisms of rootstock resistance to phylloxera will allow rational breeding of better rootstocks and more logical deployment of rootstocks. This requires understanding the interactions which foster susceptibility between grape plants and phylloxera.

4. **Rootstock breeding and selection.** Rootstocks need resistance to many soilborne pests and diseases. Any new rootstock bred for use in California must also be phylloxera-resistant. Many desirable characteristics, such as nematode resistance, drought and salinity tolerances,

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and fungal resistance will be found in *Vitis* species not considered to be highly resistant to phylloxera.

Rational breeding will require a much better understanding of phylloxera variability and biology, insect-plant interactions, and cause of plant death following phylloxera attack. Expanded collections of *Vitis* species are needed to reflect the biological variability of phylloxera resistance within grape species.

5. **Rootstock field trials.** Selection of rootstocks suitable for particular locations, scions, and cultural practices requires long-term knowledge of performance in the field. Trials are necessary to extend knowledge of existing rootstocks as well as to select the best of new hybrids. Trials must be conducted for five to 10 years in a variety of environmental conditions and viticultural practices.

6. **Short-term control.** Chemical and physical methods of suppressing phylloxera populations must be evaluated impartially. We must be alert to the potential for pesticidal resistance. ■

This report was released by the University of California June 1, 1991. In addition to the authors, Phylloxera Task Force members include: UC Davis viticulturists Andy Walker, Jim Wolpert, Carole Meredith, and Mark Kliewer; Emeritus viticulturists Amand Kasimatis, Lloyd Lider, and Harold Olmo; Farm Advisors Rhonda Smith (Sonoma) and Rachel Elkins (Lake); Agricultural Commissioners Steve Bardessono (Napa), Eric Lauritzen (Sonoma) and Chris Twohy (Lake).

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MARKETING STRATEGIES:
PROMOTING FOR PROFIT

By Stuart Bryan,
Bryan Wine Partners

Let's face it. In the national sales arena there are competitive pressures that challenge successful wine marketing and ultimately the profitability of our wineries. The question is how to create plans to stimulate sales and ***not*** risk selling below acceptable margins.

When sales are 'soft,' the common reaction is to implement measures to increase sales aimed at generating cash flow. This process, witnessed in so many industries, may be called the 'deal'; a word that should be stricken from the premium wine vocabulary. The 'deal' mentality can easily be replaced with well-planned, focused promotions. ***Promote for profit!***!

The point is not to get caught behind in sales projections and feel compelled to slash prices. Plan well in advance — and use the following ideas to work with your distributors to achieve your goals.

Marketing plans

Start by circulating your marketing plan to distributors. Make them aware, in writing, of the emphasis for your brand plan and pending changes. For instance, if you plan to double production of Dry Chenin Blanc, document this in advance to your distributors. Explain your rationale and selling points and what you plan to do to help them. In this way it is possible to preempt price-cutting because your distributor and sales agents in the field know this is a priority.

Your plan should include written goals for annual case sales. Keep this simple. Avoid too many attachments and conditions that may dilute the effort. Goals are best achieved with a distributor by taking these three steps:

1) **Preview** goals prior to release of a wine so that they are mutually agreed upon;

2) **Establish** a specific selling period for wines in adequate availability and break down goals ***by month;***

3) **Review** goals regularly and inform the distributor's managers of their sales performance.

Plan promotions in advance

Most distributors require information regarding special pricing at least 90 days prior to running a promotion. There are several ways to plan for promotions with minimal cash output; for instance, by focusing on ***new releases***.

Plan releases and provide F.O.B. prices well in advance. This idea is not simply price-oriented; release of your new vintage is newsworthy! Send out write-ups and spec sheets to distributors, sales reps, and wine writers to build momentum early.

Limited availability wines may emphasize your unique style. Work with your distributor(s) to place a 'Reserve' Cabernet Sauvignon, cellar selections, and exceptional varietals with top accounts to gain exposure for your brand. These promotions require focus efforts at the marketing level to support your most prestigious — and more profitable — wines.

Follow your calendar and plot ***seasonality***. Plan to promote your Zinfandel in the winter. This may sound obvious, but you are far better off being aggressive with sales in the first quarter of the year than having excess inventory during the summer months. This may force a small winery to discount to clear out inventory so that the next vintage will be released on time.

The first step in planning an effective promotion is to obtain a copy of your distributor's recent sales book, and study it.

Keep in mind these questions:

1) How do they price their wines?

2) How many wines similar to yours are in their book — how big is the competition pool?

3) What is the existing price range for the varietal you wish to promote?

4) If you produce a unique Rhône varietal wine, do they have any others?

5) What is their mix of American to foreign wines?

6) Do they work with large, international marketing companies that may overshadow your single brand?

7) Are they a liquor distributor?

Types of promotions

A popular technique for 'programming' a wine is a depletion allowance, whereby you agree in advance to reimburse the distributor for $X per case for sales during a specific time period. The distributor uses these promotional dollars to 'post-off' the wholesale price of your wine to stimulate increased sales.

The two 'Golden Rules' for using a depletion allowance are:

1) The distributor must participate by contributing to the discount;

2) The depletion allowance should be documented in writing in advance so you can anticipate the bill-back due from the distributor at the end of the month.

In regard to the depletion allowance, consider the **advantage** — you only pay for cases that are depleted during the program period; and the **disadvantage** — a distributor can hold these bills and submit them at awkward times, such as during the cash crunch at bottling.

Another powerful sales promotion tool is the special purchasing allowance (S.P.A.). This allows your distributor to buy in at a special F.O.B. price. Example: If your case-one price is $100 F.O.B., you may offer a price of $95/case on 25 cases and $90/case on a full pallet. The motive here is to stimulate volume purchases.

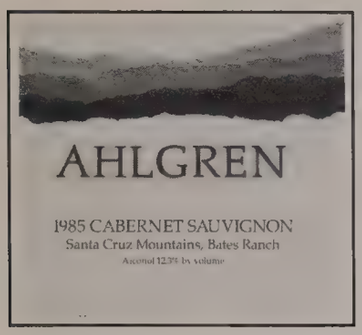
In regard to the S.P.A., consider the **advantage** — there is no bill-back. The distributor takes the promotional money up front in the form of your lower, adjusted F.O.B. price. The **disadvantage** is that a distributor can over-purchase and sit on inventory for several months, stalling sales goals by not re-ordering.

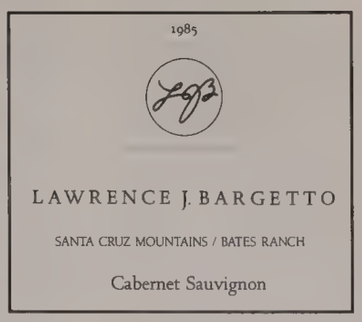
One other method of promotion involves providing incentives to sales representatives. Be careful to check the legal requirements in each state.

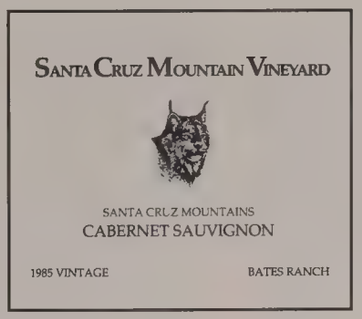
Providing promotional incentives and tools for sales representatives may provide you with creativity and ability to focus, because you can specify what you want to accomplish and pay for it in different ways. Examples of incentives include new account placements, wine list placements, wine by-the-glass promotions, or contests for highest sales in a given month or quarter.

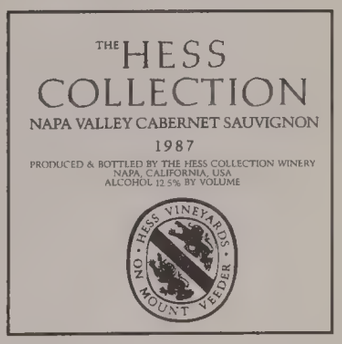
Above all, when regarding promotions, be careful to document what you've offered, what results are expected, and what the specific arrangements for payment will be. This way you can be prepared and know your winery has a plan to ***promote for profits!*** ■

Stuart Bryan is owner/managing director of Bryan Wine Partners in San Rafael, CA. which manages marketing and national sales for six West Coast wineries. Direct inquiries to tel:415/499-9020, fax: 415/499-9036.









VINIFICATION OF MOUNTAIN-GROWN CABERNET SAUVIGNON

By Eleanor & Ray Heald

Mountain vs. valley grapes. Is this much to do about nothing? Some have said so. To examine this, because the provocative discussion of similarities and differences will and should continue, **PWV** issued the call to mountain vineyards and gathered some advocates together.

The pivotal issue in any discussion about mountain vs. valley is the grapes. It's generally agreed that hillside Cabernet Sauvignon is different, but the issue cannot be approached scientifically. Neatly quantifying the discussion would end it. There is something exhilarating in the thought that we can't do this.

While enjoying the beauty of the Santa Cruz Mountains in northern California, owners Dexter and Valerie Ahlgren (Ahlgren Vineyard, Boulder Creek); winemaker Paul Wofford (Bargetto Winery, Soquel); winemaker Randle Johnson (Hess Collection Winery, Napa); and owner Ken Burnap (Santa Cruz Mountain Vineyard, Santa Cruz) shared their ideas about the vinification of mountain-grown Cabernet Sauvignon.

The diverse discussion centered around Bates Ranch vineyard in the southernmost section of the Santa Cruz Mountain Viticultural Area, near Mount Madonna in Santa Clara County. Ahlgren, Bargetto, and Santa Cruz Mountain Vineyard all purchase Cabernet Sauvignon grapes from the Bates Ranch and vineyard-designate the wine on the label.

Bates Ranch

The 19-acre Bates Ranch vineyard was planted to Cabernet Sauvignon in 1972 for attorney John Bates, who also runs a cattle operation at the ranch. The dry-farmed vineyard parcel is divided into upper (900-ft. elevation) and lower (600-ft. elevation) sections sloping south/southwest. In 1989, five acres next to the lower section was planted to Cabernet Franc which should yield a commercial crop in 1992.

The upper vineyard's 11 acres with shallow, sandy soil where grapes ripen one to two weeks earlier than the lower vineyard which is deeper and richer with redder color. A 60-ton harvest in 1983 is the largest recorded to date. More recent vintages average a total of 34 tons or 1.25 to 1.50 tons/acre.

Ahlgren Vineyard first purchased Cabernet Sauvignon grapes from Bates Ranch in 1976. "In 1977, the wine produced from the upper and lower parcels was kept separate," remarks Dexter Ahlgren. "Several tastings revealed essentially no difference between the wines and we blended them together. In several vintages since then, we have kept some lots separate and have not been able to detect significant variations."

The vines are cordon-pruned and supported with a two-wire trellis. For the more vigorous vines, a kicker can is left on the cordon arm. No herbicides are used and weeds are controlled by tilling and hand-hoeing. Minor hedging is done only to facilitate picking. "The fact that Bates is a classic, mountain, dry-farmed vineyard seems to alleviate the need for canopy lifting and other valley floor viticultural practices," Burnap contends.

Each year, Brix (23° to 23.5°) and berry flavors determine the time of picking. TA and pH have not been big considerations because they usually have not been a problem due to the dry-farming conditions resulting in 3.2 to 3.3 pH and about 0.70gm/100ml TA.

Comparative tasting

As a point of reference for a tasting of the 1985 Bates Ranch Cabernet Sauvignons produced by Ahlgren, Bargetto and Santa Cruz Mountain Vineyard, the 1985 Hess Collection was included.

"Santa Cruz Mountain vintners consistently use the term 'briary' to describe their wines," Ahlgren reports. Bargetto winemaker Paul Wofford defined this term to include a range of bushberries with an intense blackberry dominance. "There are also spicy elements and distinct forest-like qualities," he states. "In my opinion, mountain-grown Cabernet Sauvignons are more concentrated and earthy versus the cherry-berry qualities of valley floor Cabernets."

All four wines were deemed 'briary.'

Additionally, it was noted that it took some time for the aromas to evolve after the bottles were opened. "This is the nature of mountain-grown fruit," Val Ahlgren states. "This is also why we must bottle age our wines for a year or more before release."

Burnap reports that this need for extended bottle ageing led him to release wines six years after harvest. "This has become a serious marketing problem," he states. "The consumer has moved on to another vintage. They aren't interested in tasting a current release that's two year's behind most other wineries.

"When I started releasing later, I thought that people would be happy to experience the release of an 'older' wine. They're not."

Tannin levels of the various wines differed significantly. The Santa Cruz Mountain Vineyard wine displayed the biggest tannins. The Ahlgren and Hess wines were most approachable. "I ferment using a wild yeast indigenous to my estate vineyards," Burnap offered. "This may also be the reason why this wine also showed flavors in the choco-

late end of the spectrum."

Aroma and flavor profiles

Before comparing notes on winemaking practices necessary to produce a 'mountain' style Cabernet Sauvignon, agreement among producers on the following issues was accepted although not fully understood.

Mountain-grown berries have higher acids, more tannins, and deeper color.

The fruit yields a more intense and complex wine.

Skin surface area to volume of liquid is high and yields a more concentrated juice.

More concentrated 'mountain' juice produces a wine which is organoleptically different from its valley floor counterpart.

Hillside Cabernet Sauvignon needs more time for bottle ageing than those from the valley floor.

Enhanced bouquet develops after a minimum of two years in bottle.

Wines peak in about six years, but hold on a plateau for ten to 15 years.

Empirical trial and error together with experimentation are important considerations each vintage.

Ahlgren Vineyard

Ahlgren Vineyard ferments must with approximately 20% whole clusters using pure strain Champagne yeast. When the grapes are in perfect condition, SO_2 is not added at the crusher.

Inoculation with ML bacteria is done during active primary fermentation which completes in seven to ten days reaching a peak of 90°F. Punch down of the cap is done three to five times/day. When the wine is dry, the wine is pressed off the skins.

The wine is aged 22 months in American oak, 20% new and the remaining up to five-years-old. Racking is done a minimum of four times (with splashing if H_2S is evident) during the barrel regime. Depending on trials, two to five egg whites/barrel may be used for fining; the majority of the wines are unfined. The wine is not filtered.

Bargetto Winery

At Bargetto, SO_2 is not used at the crusher but the must receives aggressive aeration until the addition of ML bacteria at 1° Brix past the peak fermentation temperature of 78°F. "Early splashing gets the yeast going and wards off reduction problems," Wofford contends. Pasteur Red yeast has been used for primary fermentation.

The wine is pumped over twice daily for one hour with a piston pump at 2,000 gal/hr volume. It is pressed immediately after dryness and transferred to 500-gal ovals to complete MLF. A light, single-egg or gelatin fining is done and the wine is coarse filtered into a mix of French oak where it remains for 16 months.

During the barrel regime, the wine is racked two or three times. The wine is splashed once after the completion of malolactic fermentation.

Blending with 2% Cabernet Franc is done prior to bottling.

Santa Cruz Mountain Vineyard

Grapes are brought to the winery in 32-lb lug boxes and chilled outdoors overnight before the start of crushing about 6:30 a.m. the following morning. Crushed grapes are given a 24-hour 'cold soak' prior to inoculation with Montrachet yeast to start the fermentation which completes in six to eight days at a peak temperature of 84° to 86°F.

The cap is manually punched down six to ten times/day to control the fermentation temperature. Inoculation with three to five ML cultures is done during primary fermentation.

At dryness, the wine is pressed and transferred to settling tanks for four days prior to ageing in a mix of Allier and Troncais oak barrels (25% new and the remaining are two to five-years-old). The first SO_2 addition and the first of five rackings during the 18 to 30-month barrel regimen is done after MLF completes, usually in the summer following harvest.

The wine receives a thorough aeration the following January or February. All the wine is pumped from barrels into tanks and an overnight gelatin fining is done, if necessary. The wine is returned by gravity flow to barrels after they have been cleaned. Settling completes in the barrels.

A year later, fining trials are done and the decision is made to fine further with egg whites or gelatin, if necessary.

Hess Collection Winery

The call of the mountain has been answered by winemaker Randle Johnson for 14 years. At Hess Collection Winery, he sources Cabernet Sauvignon from 200 acres of estate mountain vineyards. Although he is most familiar with the Mt. Veeder hillside area, his comments can be extended to mountain vineyard situations elsewhere.

"Without getting into the specifics of a particular vineyard or a given year, I would deal with mountain vs. valley-grown

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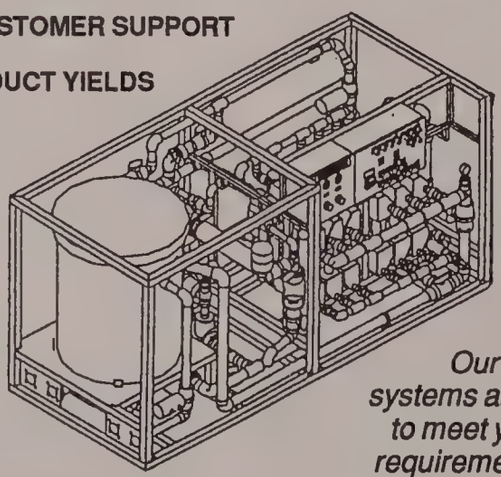

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Cabernet Sauvignon in different ways," Johnson maintains. "One of the biggest concerns for mountain Cabernet producers is tannin levels."

Johnson has experimented with different cap management techniques and different peak temperatures and it has made him a believer in punching the cap. Cap surface area to volume of liquid below is also an important factor. "I want to maximize the surface area of the skins," Johnson reports. "A one-to-one ratio is best and at Hess we achieve this using 13-ton fermenters that are eight feet in diameter and eight feet high.

"The cap is about 30 inches thick and gets three punchdowns/day with pneumatic punchers. I have found that cap punching is a tool to extract the complexity and the intensity of the fruit, but not extract as much of the harsh, aggressive tannins. This is both a stylistic and philosophical issue and one on which some mountain wineries disagree.

The berries are fully crushed before transfer to the fermenter where the tannin is 'managed'. He emphasizes that cap management coupled with controlled fermentation temperatures offers direct correlation to tannin extraction. "I strive for 80°F to 85°F peak fermentation temperature to keep tannin extraction balanced with the fruit," he says. The yeast strain during primary fermentation is Champagne.

"My goal is to emphasize the special character of mountain-grown fruit and to promote its long-term ageability without the tannins overpowering the fruit. In this way, elegant wines with finesse, full aroma, and flavor power can be produced."

Malolactic inoculation is done on the third day of fermentation at around 15° to 18°Brix. After pressing and malolactic fermentation is completed, Cabernet Sauvignon is racked to French Allier and Nevers oak with ⅓ being new. Barrel ageing time is 22 to 24 months, with three to four rackings during ageing.

Cabernet Franc and Merlot are blended with Cabernet Sauvignon prior to bottling. Egg white fining is done after the master blend is complete.

Pressing issues

All four wineries were in agreement on pressing at dryness with low to moderate pressure. Press fractions are blended with the free run juice when they have generous varietal character.

"For some winemakers, extended maceration is important," Johnson indicates. "The goal of maceration is to soften tannins. Because I prefer cap punching, the additional time for tannin softening that extended maceration lends is unnecessary.

"Due to medium tannin levels from cap management, heavy fining is not needed. Low levels of egg whites give the wine a light and gentle fining."

Marketing Strategies

Americans are not generally patient people. When it comes to their wine, they may be less so. The patient consumer will be handomely rewarded when he opens his ten-year-old bottle of 'mountain-grown' Cabernet Sauvignon. But how many of these bottles end up in patient hands?

For the producer of mountain-grown Cabernet Sauvignon, the upshot is a tight rope walking act between ageability and approachability that will be well received in the marketplace.

The producer of wine from mountain-grown grapes needs to focus on natural fruit extraction while keeping tannins in moderation. ■

WINE AND THE 'NEW SOCIAL ORDER'

By Terrence Clancy,
President - The Wine Alliance

Edited from presentation at Vintage 2000, sponsored by Buena Vista Winery, San Francisco, CA, August, 1991

In 1999, six people are seated around the table of a renowned Chateau off the River Gironde in Paulliac, France. They have just blind-tasted the 1997 vintage.

The tasting consisted of two glasses of wine. The samples were identical, except that the alcohol had been removed from one through a process developed secretly by Sans-Joy, a researcher from the University of Bordeaux.

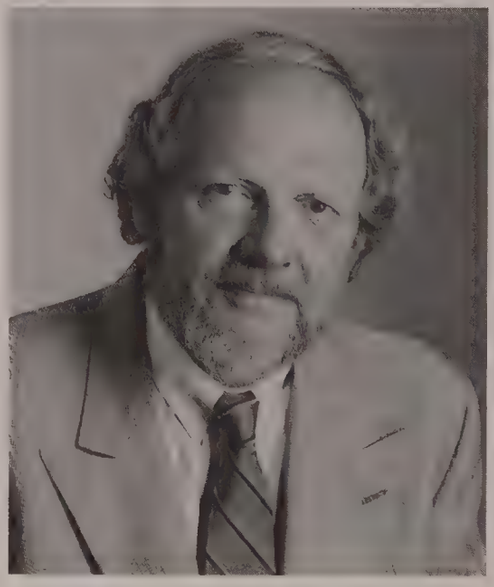
No taster was able to detect any difference between the two samples in the nose, flavor, body, or finish. Finally, it had been done: great wine, not just good wine ... without alcohol.

The tasters discussed the merits and profound consequences of this discovery and made a unanimous decision. Sans-Joy, waiting in the hallway, was summoned. He was dismissed after receiving a check for several million francs in exchange for his research notes and the exclusive rights to his process.

The managing director of the Chateau gathered the notebooks and carefully stacked them in the fireplace. A guest, an old friend, was offered the privilege of lighting a match and setting the notebooks ablaze, insuring that wine would enter the next millennium as a beverage containing alcohol.

I cite this futuristic parable to make a point. It is time for us in the wine business to face facts. We are the makers and purveyors of a controlled substance. All the images of wine, and its role in civilization from ancient Greece to Vintage 2000, are dependent on the inescapable fact that wine is a mild and delicious intoxicant.

Without alcohol, it is not wine, as the first two sentences from Hugh Johnson's book, ***Vintage; the Story of Wine***, observe: "It was not the subtle bouquet of wine, or a lingering aftertaste of violets and raspberries, that first caught the attention of our ancestors. It was, I'm afraid, its effect." I accept this reality; indeed, I embrace it, for I am more than a wine purveyor, I am a wine drinker.



Terrence Clancy

Like other winemakers and wine drinkers, I grow increasingly irritated by the legislators, regulators, and moralists — those whom I call 'Engineers of the New Social Order' — who wish to constrain my rights to make, sell, and drink wine.

The responses to these challenges mounted thus far are, for the most part, off the mark, because they fail to accept wine for what it truly is, both as a product and as a symbol.

When Robert Mondavi speaks of the sacred and romantic role of wine in civilization on his 'mission statement' back label, he affirms the symbolism of wine. This is an important first step we all must take. We should remember, though, that inherent in the phrase 'beverage of moderation' is an acknowledgement that wine, like beer and spirits, is an intoxicant and can, indeed, be abused.

We must recognize wine for what it is, and admit that detractors of the wine industry are, in many respects, correct to be concerned with the effects of wine consumption and the need to protect society from its dangers.

The problem is — as with so many ethical crusades — the regulators have gone too far already, and are not planning to stop. The wine industry cannot effectively stop them.

I am convinced of this, and to support this conclusion I would like to cite the social and political battles waged in recent years by two other industries regulated by the Bureau of Alcohol, Tobacco, and Firearms (BATF). I refer to the firearms and tobacco industries, 'fellow travelers' of beverage alcohol producers, if I may borrow a phrase from Joe McCarthy.

There are 200 million guns in America, owned by approximately 65 million citizens. In 1990, the National Rifle Association's (NRA) 2.5 million members raised and spent more than $86 million to advance their legislative agenda. Yet, they are failing, as passage of the Brady Amendment this summer illustrates.

How many Chardonnay drinkers are there in America? Are we, as a nation, consuming wine with anything near the passion or dollar outlay given to firearms and ammunition? Sadly, the answer is no.

What realistic degree of political clout and money can we expect even a united industry of spirits, beer, and wine producers to wield? Never mind that many wine partisans will never unite with other beverage alcohol producers. Even if they did, their combined strength is miniscule, compared to that of the NRA.

The most significant campaign of the wine industry is aimed not at countering the industry's detractors, but at squarely addressing a pressing social problem. I refer to the Century Council's highly laudable program to combat drunk driving.

I believe that this effort will succeed, and will go far in establishing the responsible citizenship of the participating beverage alcohol companies. What is important, however, is that the Century Council's effort is **not aimed** at changing public perception of beverage alcohol products, including wine.

What about tobacco? A substance which, though its roots in western civilization are both ancient and strong, has been legislated into decline in a short period of time through many warning labels, taxes, and regulations. How long ago did a handsome, young Ronald Reagan hawk Chesterfield cigarettes on billboards along U.S. highways? Can we estimate the millions of dollars a very united and politically well-organized tobacco industry spent in the last 20 years?

I do not make comparisons with the tobacco and gun industries because I favor their products. I do not smoke cigarettes, and do not own a gun.

But because the U.S. government has made bedfellows of alcohol, tobacco, and firearms, I have become increasingly aware of the conflicts between individual constitutional rights and the rights of society as a whole.

Anyone who thinks winemakers are in a solitary struggle against neo-prohibitionists is taking a very narrow and naive world view. The struggle is much larger. Its essence is contained in the first sentence of the Declaration of Independence:

"We hold these truths to be self-evident, that all men are created equal, that they are endowed by their creator with ***inalienable rights,*** *that among these are life, liberty,* ***and the pursuit of happiness."***

Both the rights of individuals to pursue happiness freely, and the obligation of society to protect members equally are inherent in that statement. Just as it was for Thomas Jefferson, who wrote those words, wine is integral to my pursuit of happiness. I freely acknowledge that certain restraints and regulations must govern the production, distribution, and consumption of wine so that the rights of others can be maintained while mine are being served.

But, today, we are engaged in a struggle to balance these rights, and the battle is not going well. What is happening to wine is a mere symptom of a great societal conflict that began with the civil rights movement of the 1950s. It has rolled, like a juggernaut, out of control into the 1990s, crushing many who began as devotees to its promise and its ideals.

The civil rights won during the 1950s, the free speech and assembly exercised in the 1960s, women's rights fought for and gained in the 1970s—all these were declarations of independence that echoed Jefferson's own eloquent sentiment expressed 200 years ago. It was inevitable that the other side of the ledger would turn up in the 1980s, when our government set out to save us from ourselves.

As we begin the 1990s, we find that a well-entrenched coalition of bureaucrats, special interest groups, regulators, and moralists — 'Engineers of the New Social Order' — are systematically limiting individual rights in the name of greater good for society. Thus, warning labels, sin taxes, prohibitions, and a revisionist movement that would reshape societal thought on everything from the way history is taught in grade schools to the language permissible to describe a bottle of wine.

That the pen is mightier than the sword is evident in the struggle between **winemakers** and **wine's detractors**. In coming years, the survival of wine in American society will depend on how wine is perceived both as a product and as a symbol.

The words wine, alcohol, and drugs are being conjoined. Warning label language only reinforces this fallacious equation. Indeed, one may describe reading a back label of wine today as an exercise in what George Orwell, in his novel, ***1984***, called 'doublethink.' Doublethink is the ability of a person to hold two contradictory beliefs in mind simultaneously, and to believe both. An example of a hypothetical back label might read:

"This rich and elegant Cabernet can be enjoyed now. Women should not drink alcoholic beverages during pregnancy."

Doublethink is here. Orwell's 'thought police' knew that when they said: "Reality is not external. Reality exists in the human mind and nowhere else ... whatever the party holds to be truth is truth." In other words, it is the **power to define truth** which alters the perception of reality. **The control of language is the source of this power**.

Wielders of power have long known this. We have only to look at the number of poets jailed by Joseph Stalin to understand the implications of the control of language. And the wine, comrade, is bottled poetry.

Imagine how some might wish to alter the offeratory of the Catholic Mass, which might then read: "Blessed are you, Lord, God of all creation. Through your goodness we have this wine to offer, fruit of the vine, and work of human hands. It will become our spiritual drink. Consumption of alcoholic beverages impairs your ability to drive a car or operate machinery, and may cause health problems."

'Engineers of the New Social Order' will not stop with simple warning labels. Consider the implications of the Kennedy-Gore proposals which would affix, in rotation, five different warnings, not only to products, but to advertising and marketing materials for those products. Never mind that the real intent of this legislation may be to make advertising beverage alcohol products too expensive and impractical. There is an even more Orwellian aspect to it. One of these proposed warnings might read:

"Drinking alcohol may become addictive. If you know someone who has alcohol or other drug problems or has trouble controlling their drinking, call 1-800/ALC-OHOL."

California's Proposition #65 opened the door to the primary right of action of private citizens taking to task anyone violating the law. Who can say the proposed 'consumer information line' to be listed on

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future warning labels cannot or will not encourage a nation of whistleblowers as insidious as the 'patriots' of Marshal Petain's Vichy government in France who were rewarded for naming names?

The Orwellian nature of these exercises of imagination may seem absurd, until one realizes the lengths to which the BATF has already gone to control language, image, and symbol. Consider the denial of the label request by Clos Pegase Winery to use the art of Jean DuBuffet — a portrait of a naked man.

David Kelso of Oakland, CA, considered this incident and wrote to the Editor of the *San Francisco Chronicle*: "I guess the freedom of expression means we can see the same Jean DeBuffet naked man in newspapers and the evening TV news that federal authorities forbade Clos Pegase to reproduce on a wine label. Does our government ever worry about, well, appearing silly?"

I have an answer: Yes, it does. Stephen Higgins, Director of BATF, wrote to the *Wine Spectator*: "I usually try to exhibit a sense of humor and don't feel I'm especially thin-skinned. However, I found the April 1991 Fools' Lampoon on the men and women of the BATF to be in fairly poor taste."

Higgins enumerated his displeasures and closed with a castigation some may find tinged with big-brotherism: "Through the years, we have observed the *Wine Spectator*'s development into a very responsible wine publication dedicated to wine and wine enthusiasts. To maintain that credibility, and a sense of social responsibility, **I urge you to avoid making light of the serious nature of law enforcement."**

The 'Engineers of the New Social Order' are deadly serious. In fact, it is a lack of joy, a need for uniformity and security, a willingness to sacrifice individuality for the safety of social order, and an utter inability

to laugh which unites the 'Engineers of the New Social Order.'

They are very concerned with language, image, and symbol. The extent to which wine has become a part of 20th-century American culture has depended largely on how those of us, who have come to love wine, were first attracted to it.

Many of the most powerful and appealing images of wine in literature are laden with abuse. Consider Evelyn Waugh's shining descriptions of claret and port debauches at Oxford. Hemingway's fondness for Bordeaux drew many a literary soul to those wines, though his alcoholism served as a potent warning label of its own.

The antics of Sir John Falstaff and his heroic consumption of Sack entertained audiences for three centuries. It is not hard to imagine William Shakespeare being denied an N.E.A. grant today for a socially irresponsible portrayal of the consumption of alcohol.

Language, image, and symbol. Together, they are responsible for wine's place in western civilization. Today, they are the chief weapons wielded by those who would revise the history and imagery of wine. "Reality exists in the human mind and nowhere else ... whatever the party holds to be truth is truth," Orwell wrote.

How fitting, then, that Orwell so well understood the powerful symbolism of wine. In a crucial scene in the book, *1984*, protagonists Winston Smith and Julia have just declared their hatred of Big Brother to a man named O'Brien, an 'inner party' bureaucrat they believe to be a leader of the resistance. They sealed their revolutionary pact:

"O'Brien took the decanter by the neck and filled up the glasses with dark, red liquid. It aroused in Winston dim memories of something seen long ago on a wall or a hoarding — a vast bottle composed of electric lights which seemed to move up and down and pour its contents into a glass. Seen from the top, the stuff looked almost black, but in the decanter it gleamed like a ruby. It had a sour/sweet smell. Julia picked up her glass and sniffed at it with frank curiosity.

"'It is called wine,' said O'Brien with a faint smile. `You will have read about it in books, no doubt. Not much of it gets to the outer party, I am afraid.' ... Winston took up his glass with a certain eagerness. Wine was a thing he had read and dreamed about ... it belonged to the vanished, romantic past, the olden time as he liked to call it in his secret thoughts."

The 'Engineers of the New Social Order' are correct. Wine is dangerous. Its symbolism is powerful in the secret thoughts of revolutionaries who are unwilling to further sacrifice individual rights for the protection of society from itself.

What are the best weapons for us revolutionaries? Language, image, symbol. It is time to begin using these tools as they have been used in the past, to make wine a forbidden fruit once more, to say that wine is what it is — a mild, delicious intoxicant, not just another beverage, but a potent symbol of life and sophistication.

Acceptance of wine for what it is and what it represents is the first positive step that can be taken by anyone who cares about it and its future role in society. But there is more that can be done. I would like to offer six concrete ways in which we can work toward the restoration of the symbolic and cultural importance of wine.

1. People who care about wine and about the rights of winemakers, wine sellers, and wine drinkers have begun to form worthwhile organizations defending these liberties with increasing effectiveness. AWARE and the Family Winemakers of California, for example, are deserving of personal involvement, as well as political, moral, and financial support.

2. The courts, too, can be used in defense of the rights of winemakers, wine sellers, and wine drinkers. No one likes the litigious nature of today's society, but the 'Engineers of the New Social Order' are wielding the lawsuit as an effective weapon against us. It is time to level the playing field. Unfair allegations and unconstitutional restrictions can and should be addressed in courts of law.

3. Political candor should be applied to the many requests for wine donations received by wineries day in and day out. Anyone who thinks enough of wine to make it a feature of their social or charitable event should be solicited to support the best interests of the wine business itself. Grassroots political movements begin with the recognition of common interests.

4. The temptation to accept federal or state government handouts should be avoided in almost every instance. For the most part, these 'subsidies' are controlled by very large wine producers whose interests are contrary to those producing fine wine. Moreover, participation in such pro-

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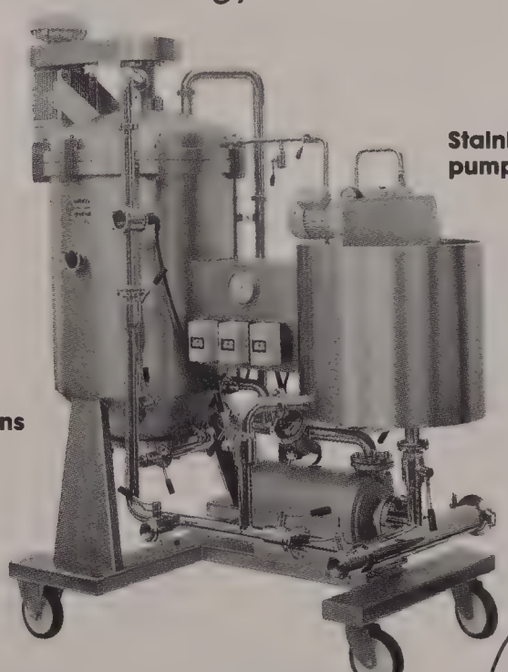

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grams is a submission to two enemies of fine wine — bigness and bureaucracy, the silent brethren of the 'Engineers of the New Social Order.'

5. The task of restoring wine to its cultural importance also can be furthered by separating wine from guns and tobacco and placing it under the auspices of the U.S. Dept. of Agriculture. The symbolic association the government has created between alcohol, tobacco, and firearms has unfairly altered the public's perception of wine.

Recognizing wine as an agricultural product is a cause that should be on the political agenda of everyone who cares about wine, and it should be a litmus test for the politicians seeking our financial and electoral support.

6. Finally, I believe we must begin, once again, to mystify wine. For too long, American wine producers entertained the belief that success in the market depended on familiarizing masses of consumers with wine. The premise was that once they understood wine, a cultural transformation would follow, along the lines of the European model of wine consumption.

But, as in Europe, there is not one wine culture in America, but two. Though Americans would prefer to ignore it, a class system exists in the U.S. that evidences itself in the marketplace. It is a fallacy that the pop-wine drinker of the 1970s will become the Jordan Cabernet fancier of the 1990s. This is no more possible than for the average French consumer to 'graduate' from Minervois to Chateau Latour or from *croque monsieur* to caviar.

We must realize that the continued growth of the high-end, luxury wine business has come **because** of wine's sophistication, **not in spite of it**.

Moreover, there is a down-side to 'demystification' which I believe we have begun to experience. By taking wine from its cultural and symbolic role we have made it just another commodity like alcohol, guns, and tobacco. We have allowed wine to be regarded as just another controlled substance at the mercy of the 'Engineers of the New Social Order.'

If there is hope of winning both the minds and pocketbooks of the American public, that hope lies in restoring wine to its rightful place in civilization through language, image, and symbol. Language, image, and symbol are the very blood, skin, and bones of marketing, and can be used to unite increasingly well-educated and sophisticated consumers with products that reward their sensibilities.

I do not wish, therefore, to demystify wine. I prefer Agatha Christy to *Prevention* Magazine. If, as Orwell stated, reality is not external, but exists in the human mind, then I choose to enter the battle for the minds of wine drinkers armed with language, image, and symbol.

To the woman strolling through the wine aisle in the Safeway store, I will not cite evidence that moderate consumption of wine may increase longevity. I will not help her pronounce the words "Clos du Bois." I will not suggest that she take home a nice bottle of California Chablis and come back for something better when she has developed a palate for drier wine.

Rather, I will whisper in her ear the words of James Joyce, "White wine is electricity."

The 'New Social Order' is upon us, and it has come not only while we slept, but while we failed to dream. Awakened now, our best hope is to fight as poets who sing both mystery and truth. ■

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MARKETING WINE GRAPES

By Bob Dempel, Dempel Farming Co.

I was introduced to grape marketing at the young age of 14. National Distillers had just purchased the Italian Swiss Colony Winery in Asti, CA, from the Prati and Rossi family, and they were not going to buy our upcoming crop, which was already on the vine. As harvest neared, National Distillers did purchase the crop for $35/ton.

The next year my family joined Allied Grape Growers, which started in the San Joaquin Valley in 1951 as a farmers cooperative to market and process wine grapes. Allied Grape Growers eventually became the largest grape-grower cooperative.

By law, I am licensed as a grape broker by the California Dept. of Food & Agriculture (CDFA). Growers need not be licensed, but must be prepared, have the tools, and dedicate time to marketing.

I divide grape marketing into four categories.

1) Over the years I have seen growers market 'with their hat.' They take their hat off and ask, "What will you give me for my crop?" Basically this leaves them in a position of asking for an offer for the crop—just any offer.

2) My family elected to join a marketing cooperative. There have been many cooperatives in the North Coast region of California: Sonoma County Grape Cooperative, Guild, and the Little and Big Cooperative in Napa Valley.

I would be less than honest if I said that the co-ops have been highly successful. They did serve as a home for growers' grapes. They have a degree of financial security, but the greatest benefit is that they handle marketing of the growers' fruit. The down side of cooperatives is revolving funds or assessments and image.

3) Self-marketing is where the grower takes time to develop and execute a marketing plan for the grapes.

4) Convert grapes into wine and later sell the product on the bulk market.

I want to discuss the last two categories in depth. Many growers feel that their grapes are sold when the truck crosses the scales empty leaving the winery. My definition of a 'sale' is when the product is consumed or utilized, not in a winery, tank, warehouse, or retail store, but sold to the consumer. That is a true sale.

Many tools are available today to market grapes. California is home to almost 800 wineries, and growers can find information on them in many directories.

The *Wines & Vines* Buyer's Guide is a very complete listing. Annually, it includes each winery and the wine varieties produced. It makes little sense to spend time marketing Chardonnay grapes to a winery that only produces Cabernet Sauvignon.

The best tool is the "Crush Report" published by the CDFA each year in March. This gives such information as tons crushed, purchased, average price, and range of price by variety and region. Everyone can receive this free report from the CDFA.

I have the Wine Institute handbook, but this is only available to Wine Institute members. However, not every winery is a Wine Institute member.

Another tool is the California Association of Winegrape Growers (CAWG) booklet which is designed to help growers market grapes. It lists the winery, contact person, phone, and the grapes they are interested in purchasing.

There is the grape acreage survey, a recent report regarding the grape business in Sonoma County only.

The Federal/State Market Newsletter provides annual reports on acreage of grapes and varieties.

The Gomberg & Frederickson reports on wine sales provide useful information also.

I have two important points to share:

1) The current marketplace is no place for less than top-quality product. With the exception of Chardonnay, grapes today are difficult to sell on the open market.

Gone are the days of waiting for the crop to reach a desired sugar level and immediately starting to harvest. Wineries have added delivery specifications of total acid, pH, grape temperature, harvest methods, delivery containers, MOG defects, turning of grapes, leaf removal, trellis systems, thinning, irrigation, acceptable pesticide use. The

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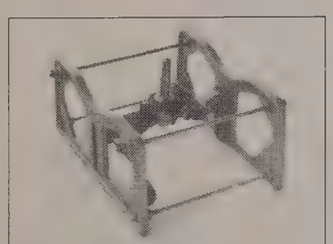

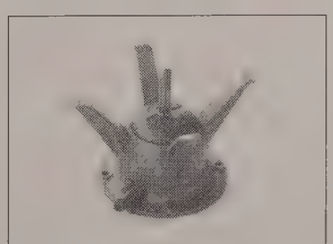

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list also includes taste, smell, and color, etc.

Gone are the days of mixing varieties, stacking loads, watering down loads, and a long list of undesirable actions which only served to lower the grapegrower's profession.

2) The days of open battle between the winery and grower have been called to a truce. For many reasons, every grower should be on a high level of communication and agreement with the winery, winery personnel, and grape buyer.

Forty years ago it was unheard of to have contact with wineries other than when the contract was signed and the grapes were delivered.

Today, wineries hold grower seminars, have trained viticulturists on their staff available to help growers, and hold one-on-one grower/winemaker wine tastings, tasting only the grower's wine.

Last, but not least, there are the social events: lunches, dinners, and in some cases, harvest food for growers while they are delivering grapes. I urge growers to include winery personnel in a social event where you cannot only reciprocate, but take time for a vineyard tour and tasting.

Sizzle in marketing

I define sizzle as an image which projects itself prior to the sale of a product. I prefer to wear Levi's, but I doubt that they are much better than Wrangler or Lee jeans. I believe it is the image; a sizzle.

The masters of wine industry sizzle are people like Robert Mondavi, Jack Cakebread, Zelma Long, and Joe Heitz. Heitz markets "Martha's Vineyard" like it is a spot next to the Pearly Gates.

Today, wineries place their name and logo on T-shirts, hats, aprons, and a variety of souvenirs. Growers who market sizzle are far fewer in number but just as innovative.

I cannot mention image without including Robert Young Vineyards. Bob has done an excellent job of putting his name on the wine label and creating an image. In my opinion, other notable growers, all who have devoted time, ingenuity, and money to present a sizzle image, are Dutton Ranch Chardonnay and Wasson Vineyards.

If all else fails as you approach harvest, you may wish to explore having the grapes crushed at a local winery and held as wine for you to sell on the bulk market. Only in extremely rare cases do I recommend this. You will have the expense of harvest, processing, and storage to pay up front. In some cases, the winery will assist you in marketing the wine.

In California, there are several qualified wine brokers. I strongly suggest you contact any one of them prior to making a decision to custom crush your fruit. Four wine brokers in the North Coast are: Joseph Ciatti Co., Mancuso Wine Brokerage, Turrentine Wine Brokerage, and Vintners Edge.

It appears that if you are raising Chardonnay grapes, you do not need any help in marketing. However, in 1982 I left Chardonnay on the vine and in 1983 I brokered Chardonnay for $300/ton. I sincerely hope I never see that again, but only you as a grower can really make the determination if you are just selling your grapes or selling wine and some sizzle.

In summary, forget your hat, and only in the most dire case should North Coast growers consider a co-op today. ■

(Presented at the seminar, "Marketing Wine Grapes in a Changing World", held in Healdsburg, CA, June 1991, sponsored by the California North Coast Grape Growers Association .

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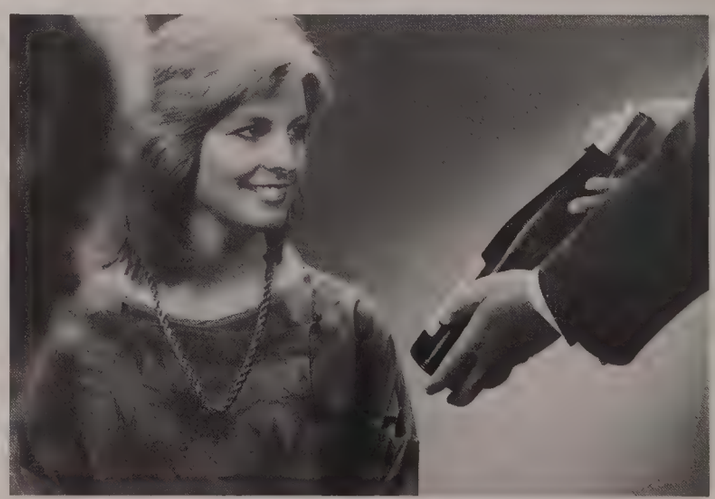

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MICROPOROUS CROSSFLOW FILTRATION

Crossflow filter manufacturers have promoted microporous crossflow equipment to the wine industry for several years. The biggest obstacles have been high capital cost, traditional attitudes, and filters not specifically designed for wineries.

Several wineries are now using microporous crossflow filter equipment designed for wineries. The following briefly describes the principles and benefits of microporous crossflow filtration along with some reasons why it is capturing winemakers' interest. This report also provides questions you might ask your crossflow filter supplier, for more information.

Crossflow differs from perpendicular-flow filtration used by most winemakers today. For example, in winery pre-bottling membrane filtration, the flow of wine is perpendicular to the membrane's surface. Solids in the wine gradually foul or plug the pores in the membrane, slowing the flowrate through it. This is also called 'dead-end' filtration.

Crossflow filters operate differently. Wine flows parallel to the surface of the filter medium. A pressure differential is maintained from one side of the filter medium to the other, so that clear liquid can pass through it. But particles are kept in suspension and swept away from the pores by the crossflow motion (also called tangential flow). The remaining unfiltered wine with solids may be recirculated again across the filter medium to remove more clear liquid.

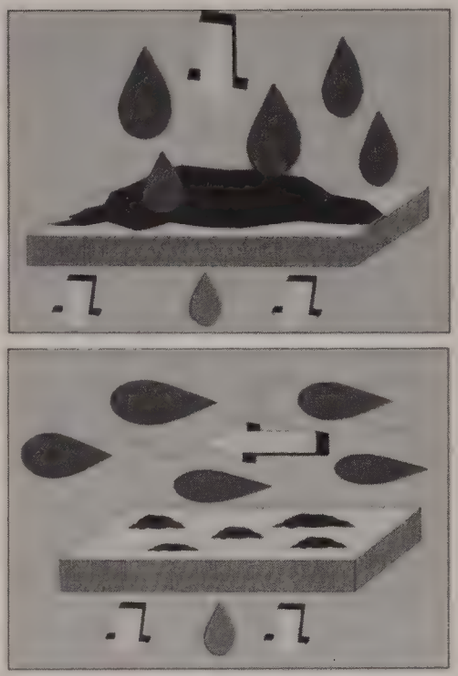
(See diagram comparing crossflow and perpendicular flow filtration.)

Solids in the wine to be filtered are concentrated until they reach a level that slows the filtrate. The concentrated solids are disposed of in the same manner as lees.

Crossflow filtration covers a wide range of filter capability. Reverse osmosis uses the principles of crossflow filtration to separate compounds up to about 1,000 molecular weight. Reverse osmosis can separate alcohol from wine. It is also used to concentrate wine and juices.

Ultrafiltration separates larger particles up to 100,000 molecular weight. This includes removal of color and protein. Ultrafilters are built with a specific molecular weight cutoff, which is still too tight for most wine filtrations.

Microporous crossflow filtration operates in the same range of particle removal as diatomaceous earth (DE) or pad filtration, and pre-bottling membrane filtration. This is the type of crossflow filtration with the biggest application for winemaking. Microporous crossflow filters are available now that are more compatible in a winery environment. They include features such as portability, automatic controls, and ease of operation that led to the success of pressure-leaf filters in the wine industry.



TOP: Conventional filtration
BELOW: Crossflow filtration Liquid flows tangentially across the membrane surface minimizing the build-up of solids. Only part of the liquid flows through the membrane with each pass. "Sweeping action" of the crossflow process prevents blockage of the membrane. (Illustration provided by Romicon)

Winemakers are interested in microporous crossflow filters for many reasons. Some winemakers want to eliminate the cost of filter aids (DE, perlite, fibers, etc.) and filter sheets, as well as the cost of storage and disposal. Some winemakers have environmental concerns such as avoiding filter aid dust or reduction of winery waste.

Less labor is required to operate a microporous crossflow filter, because there is no time required to pack or precoat a filter. There is better wine recovery without any filteraids or filter sheets to absorb wine.

Some wineries may find a microporous crossflow filter valuable to clarify wine at various stages in processing to bottle-ready clarity.

The decision to purchase a microporous crossflow filter should include an evaluation of all the above benefits, plus a review of the current cost per gallon or annual operating costs. Then determine how a new microporous crossflow filter will reduce these costs.

To do this, the winemaker must evaluate all filtration steps. For example, microporous crossflow filtration might replace multiple filtrations with a single one. It may enable filtration without waiting for settling time. Wines that require high DE-dosing rates and frequent filter set-ups also might be filtered more easily with crossflow.

The above is a very simple description of microporous filtration, its operating principles and advantages. A crossflow filter supplier can provide additional, specific information (see below for questions to ask). Get references from the supplier and contact them.

A. Operations

1. What features of this filter make it specifically designed for a winery environment? How portable is it? What are the dimensions? How is oxygen pick-up prevented? How are heat build-up or other wine quality concerns addressed?

2. What features of this filter make it unique from other crossflow filters? Evaluate cartridge design, fiber diameters, back-flushing, and anything else that separates it from other filters available.

3. What is the actual flowrate? (You will find different flowrates for different wine types, just as you do with filter aids and filter sheets.) Do not compare only surface area. Get **actual** flowrates from winemakers who have used the filter.

4. How much operator time is required for start-up, operation, shutdown, and cleaning?

5. Does the wine have to be prepared in any way prior to filtration? This includes enzyme addition or solids removal (settling, centrifugation or prior filtration).

B. Cleaning

1. How is it cleaned? Does it use common winery chemicals such as caustic and chlorine, or are specialized chemicals needed? (As with all equipment, the easier it is to clean, the more likely it will be done correctly.)

2. How often is it cleaned? How long does cleaning take? Cleaning time is downtime which affects flowrate requirements.

3. Can the filter be back-flushed? How is this done? How often?

C. Service

1. What is the warranty on the filter

equipment and cartridges?

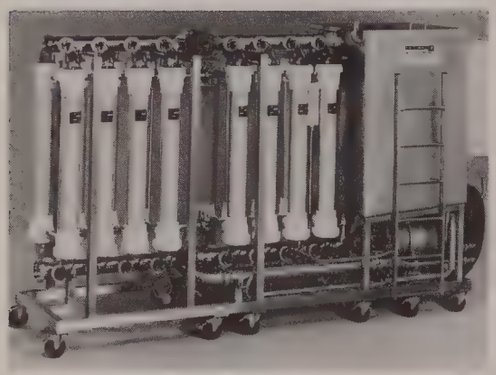
2. What are the expected life and replacment cost of cartridges? (Some wineries have obtained 'deals' on new equipment only to find higher operating costs with frequent cartridge replacement.)

3. What is the availability of service and spare parts?

After reviewing the above, the final question should be: "What about wine quality?" Only you can accurately answer this because every winery has a different concept of what quality should be.

If you are as objective as possible when reviewing the economic benefits and performance of microporous crossflow filters, then you will determine more easily if this technology will have a place in your winery.

This information was prepared by Peter Allan, KLR Machines, Inc., representative for Romicon, and includes input from MEMCOR, and RLS Equipment, representative of Strassburger.



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The Romicon Wine Filter is designed specifically for winery use. Filter sizes range from two to 48 cartridges, filtering 800-gph to 3,800-gph.

An asymetrical pore shape handles wines even with suspended solids, including wines with difficult to filter fining agents, such as bentonite, carbon, and gelatin.

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For more information, contact: **KLR Machines, Inc.**, 350 Morris St., Suite E, Sebastopol, CA 95472, tel: 707/823-2883. **Please see our ad, page 9.**

▼ **Buckingham Valley Vineyards** in Buckingham, PA (annual production of 30,000 gallons), purchased a Romicon WF-2 (two cartridge) Winefilter in 1990. Winemaker/owner Jerry Forest has filtered more than 18,000 gallons, mostly in 1,000 and 2,000-gal lots. Wine varieties filtered include Cayuga, Chambourcin, Concord, Niagara, Seyval, Vidal, and Villard.

All wines received pectic enzyme at crush and were settled and racked at least once prior to filtration. No fining agents were used. Wines filtered in November/December 1990 had over 1% solids, wines in March/June 1991 had less than 1% solids.

The average flow rate is 160-gph. Most of the time, the filter was left unattended and shut itself off when a batch was finished. The flow rate starts out at about 300-gph and drops to 140/180-gph within the first hour. Near the end of the run, it may get as low as 100-gph. The flow rate does vary directly with temperature.

The average temperature increase of wine filtered was 2°C to 5°C and varied directly with the ambient temperature and duration of the run.

Forest has experienced little or no waste. The remaining concentrate (12 to 15 gallons average) has been combined with other batches to be settled and filtered later. If the concentrate was not saved, it could be reduced to 6 to 8 gallons of waste, but this would result in greater temperature rise and require additional cleaning of the cartridges.

There are four levels of cleaning to be done according to cartridge condition and flow rates. Normal rinsing and back-flushing (after every use) takes 30 to 45 minutes. Full chemical cleaning and sanitation can take several hours (mostly unattended recirculation time).

Savings in time, manpower, fining agents, and filter pads help offset the relatively high cost of the filter.

▼ **Byington Winery** in Los Gatos, CA, has a Romicon WF-4 (four cartridge) Winefilter for filtering dry, white wines.

The wines are bentonited (up to 4-lbs/1,000-gal), cold stabilized, and filtered with the Winefilter. After filtration, the wines are held in storage tanks until put through a 0.45µ membrane filter ahead of the filler.

"The time saved from doing a rough, followed by a polish filtration, allows for a more relaxed processing schedule," says Greg Bruni, winemaker.

Wines to be filtered have trace solids (less than 0.1%) and achieve an average flowrate of 400-gph. The Winefilter is only used during the day shift and is cleaned when a filtration run is completed, usually after two days. Cleaning time is 3 to 4 hours.

Casey Bruni, cellarmaster, reports significantly lower winery waste and reduced labor costs. "Not only does it save time by reducing multiple filtrations to only one," says Bruni, "it also eliminates a lot of additonal labor associated with multiple filtrations, such as washing more tanks and hoses, along with more scheduling and record keeping."

▼ **Hallcrest Vineyards**, Felton, CA, purchased a Romicon WF-4 (four cartridge) Winefilter in 1990 to filter 80% of their annual production. The Winefilter is used to stop fermentation of white wines, with varying residual sugar up to 2%, depending on the wine type.

After finishing operations, white wines are blended and receive a second filtration. The wines remain in storage until put through an 0.45µ membrane filter ahead of the filler. Flow rate is about 250-gph to 500-gph with a wine temperature of 35°F to 50°F.

Red wines needing filtration receive only one filtration after ageing, fining, and blending. Flow rate is 180-gph to 250-gph with wine at cellar temperature.

There has been noticeably increased wine recovery because no wine is lost in filter sheets. The Winefilter has replaced the pad filter which has been sold. Labor required is about ⅓ of that required to run a pad filter. The cost of filter sheets was eliminated and the pre-bottling membrane life has increased.

The filter receives a hot water rinse for partial cleaning between filtration cycles of about ½ hour. A full chemical cleaning is two to four hours. In both cases, the filter is left unattended on circulation most of the time. The operator is only required to mix chemicals and start each step.

▼ **Oak Ridge Vineyards**, in Lodi, CA, has a Romicon WF-16 Winefilter (rated throughput of 650 to 1,300-gph). The Winefilter is used almost continuously nine months of the year on finished wines and juices from 0.5% solids down to trace solids. During harvest, depectinized juice with 1% to 5% solids is filtered.

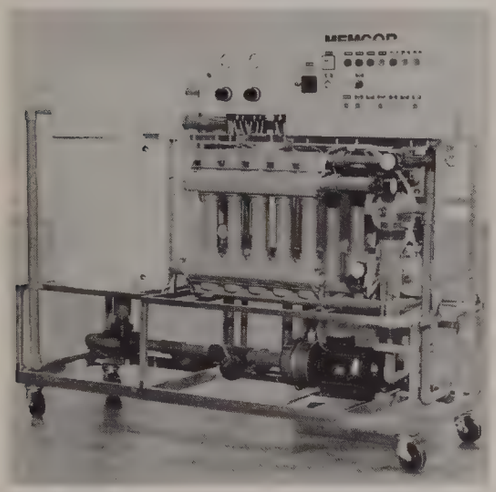
Wine temperature feeding the filter ranges from 28°F for fresh juice and wines off of cold stability, up to 60°F for wines prior to bottling, and slightly higher for dessert wines.

Flow rates on finished Central Valley white varietal wines before bottling aver-

age 2,000-gph. Finished dry red varietals, including Cabernet Sauvignon, average 1,000-gph. Dessert wines run at about 700 to 1,000-gph. Fresh juice can flow at 250-gph, but filtration prior to bottling may be as high as 1,500-gph.

The Winefilter is cleaned every two or three days when used on finished wines, depending on batch sizes, solids levels, and flow rates. The Winefilter is cleaned daily when filtering fresh juice. A full caustic and chlorine cleaning requires four hours. A quicker partial caustic cleaning takes 1½ hours.

"Greater wine recovery has been experienced than with diatomaceous earth or filter sheets," according to Lee Eichele, winemaker. Automatic operation and cleaning allow filter operators to do other tasks. "Filtration costs have been reduced significantly by not using DE or filter sheets," adds Ted Wojnar, cellarmaster.



MEMCOR

Memcor® Continuous MicroFiltration (CMF) differs from other membrane systems in that it relies on a patented gas backwash to prevent membrane fouling. This allows for higher product throughputs and greater production capacity.

Additional advantages of the gas backwash are less chemical cleanings, reduced downtime, and elimination of the need to utilize already filtered product for backflush purposes.

Strong, durable polypropylene hollow fiber membranes assure complete removal of suspended solids and micro-organisms in the 0.2µ range and guarantee turbidities of less than 1-NTU. Stability and exceptional clarity of a broad range of wines is assured.

Memcor CMF wine/juice equipment is available in eleven different capacity systems. The largest contains 120 sq. meters of surface area. The systems are modular and compact in design and include a built-in, real time membrane module/systems integrity test. All systems are operated by a programmable controller, and are easy to operate and require minimal attention.

Over 200 Memcor CMF systems are installed worldwide in food, beverage, and industrial applications. Operating history to date indicates long service life with documented reports of membranes lasting over two years.

Memcor CMF proven performance, in terms of increased product yields, reduced product losses, long on-stream membrane service life, and low operating cost, make economic payback justification easy when compared against conventional and other types of membrane filtration systems.

To learn more about Memcor CMF technology and how it might meet your filtration needs, contact: **Memcor**, 5 W. Aylesbury Rd., Timonium, MD 21093, tel: 301/252-0800. **Please see our ad page 24.**

▼ **Andres Wines Atlantic Ltd.**, in Nova Scotia, Canada, installed a Memcor filter in October, 1989 and has filtered over 530,000 gallons of wine including Concord, French Colombard, Semillon, and Thompson. The filter is used on fined, centrifuged wine with a very low solids level.

The Memcor unit has replaced D.E. filtration and reduced sterile pad and final cartridge membrane usage. Andres filters the wine down to 0.2µ which can lead to longer shelf life.

The wines receive pectic enzymes during fermentation. Average wine temperature during filtration is 15°C and the flow rate is 16.7-gpm. At the end of the filtration run, a heat gain of about 10°C is experienced on 5% of the wine batch.

The unit's backwash is contained within the system and then refiltered. The resultant wine losses are as low as 0.5%.

Clean-up requires one hour. Memclean, a caustic/surfactant cleaner purchased through Memcor is used. Typical cleaner usage is 55 gal/year.

Information from Andres was supplied by Bruce Ewert.

▼ **Canandaigua Wine Co.** in New York state has filtered over 20,000,000 gallons of wine in three 50-cartridge (purchased in 1988) and one 90-cartridge (purchased in 1990) continuous microfiltration MEMCOR filters.

Table and dessert wines are filtered after fermentation and prior to bottling with these filters. One 50-cartridge unit is dedicated to wine cooler filtration.

Wines after fermentation are treated with bentonite, if needed, then passed through a centrifuge prior to Memcor filtration. The Memcor unit cannot handle bentonite or activated carbon.

Average flow rates for red wine after fermentation are 15-gpm in the 50-cartridge unit and 30-gpm in the 90-cartridge unit. For white wines after fermentation, 40-gpm in the 50-cartridge unit, and 75-gpm in the 90-cartridge unit. Flow rates for all wines prior to bottling are 40-gpm in the 50-cartridge unit, and 75-gpm in the 90-cartridge unit.

Canandaigua filters wine at a temperature between 68°F and 70°F and experiences a 1°F heat gain for every 300,000 gallons filtered.

Wine recovery approaches 98% after filtration. The remaining 2% sludge is filtered through a rotary vacuum filter. Clean up is simple. Less than two hours per unit of clean-up is required. Caustic is used, followed by hydrogen peroxide for sterilization.

Only three cartridges out of 240 have been replaced in the three years of operation due to cracks in the PVC construction. Check valves need replacement every 3,000,000 gallons. The Memcor back-pulsing system maintains a clean membrane surface during operation, extending the run.

Canandaigua achieves immediate 0.22µ clarity without adjusting the filter. The units can be bubble-point tested for sterility.

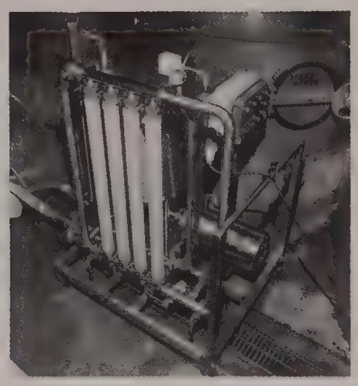
Canandaigua has experienced no stripping of aroma or flavor during filtration.

The original three units paid back their investment in one year from savings in filter pads, diatomaceous earth (DE), labor, and DE disposal, and a 10x extension in the life of final membrane filters. Payback on the larger unit will be 1.5 years.

Information from Canandaigua was supplied by Domenic Carisetti winemaker, Richard Stabins, winery manager, and Frank Muscato, maintenance supervisor.

RLS Equipment Co., Inc.

The Strassburger MicroCross Filtration System is a cross-flow filter designed specifically for wine industry use. The MicroCross has a hollow fiber construction of polysulfone. Each module has 2.5 sq. meters of filtration surface (bundled fibers). Each fiber has asymmetric (smaller to larger) 0.2 micron-rated pores which allow for better flow with less clogging or heat build up. (Heat generated is less than 2°C during the entire filtration process.)



The filtration modules, in combination with a specialized centrifugal pump and electronic controls, make up the MicroCross Filtration System.

Actual operation of the unit is quite simple and requires only 15 minutes of instruction. Backflushing is accomplished simply by closing one valve, creating a pressure differential within the unit. All operations can be performed manually, or the filter can be equipped with fully automated controls, from start up to backflushing, to shut down.

Cleaning is as easy as operation, and even in the 'worst case', can be completed in less than 30 minutes.

The MicroCross is available in sizes ranging from four to 64 modules, approximately 200gph to 3,200gph. (Rates based on actual production.)

For further information, contact: **RLS Equipment Co.**, PO Box 282, Egg Harbor City, NJ 08215, tel: 609/965-0074 or 800/527-0197 (West Coast).

Please see our ad page 18.

▼ **Schatzler & Eller Weinkeller** in Westhofer, Germany, purchased a Strassburger MicroCross MCC 120/16 filter with a nominal capacity of 2,000 liters/hr, in 1988 for filtration of Muller Thurgau, Riesling, Spatburgunder, Sylvaner, and sweet reserve (grape juice).

In one year, almost 2.5 million liters was filtered. A larger Strassburger Microcross filter (MCC 120/20, nominal capacity of 2,500 liters/hr) was purchased in 1989 and more than 2.8 million liters has been filtered with it. The smaller unit has been sold.

The MCC filter has saved personnel and cost, and improved wine quality because the MCC unit removes undesired taste and aroma with the least stress to the wine, including a maximum temperature increase of 1-2°C.

All necessary filtrations are executed in one operation. The filter is flushed with water weekly. There is little to no waste.■

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PREPARE FOR A SUCCESSFUL DISTRIBUTOR'S SALES PITCH

By Dan Wilson,
Innovative Wine Marketing

How do you get the most out of your nine-minute slot in front of the distributor's sales force during a typical Friday sales meeting?

It helps to ask why you are there in the first place and to clearly define the obstacles:

1) The group is diverse, coming from many departments within the distributorship, and nothing you can say will interest everyone.

2) The audience expects to be reprimanded in some form and tunes out to ease the pain.

3) The presenter ahead of you provided the group with a big lunch and lots of wine in an effort to impress them.

4) The audience has been totally confused by the patchwork quilt of previous presentations and when they pick up the trail of your remarks, time is up.

5) They have such burdensome priorities from other sources that they feel helpless in addressing your needs.

6) All of the above.

Optimal solutions to ineffective sales meetings require cooperation between the distributor and winery. I recommend telling the sales manager, "I would like to make the most effective presentation possible. This is the message I want to give. How do you suggest I approach it?"

The advice you receive at first may be very general, but you will have started a process that will pay big dividends over time. Depending on the distributor manager's powers of observation and willingness to be candid, he may offer suggestions such as the following:

Do not:

1) Read material that you also are handing out in written form.

2) Hand out paperwork until you really need it to be in their hands — it distracts people from your spoken message.

3) Recite orally numbers or other hard-to-grasp information.

4) Isolate persons or departments for criticism.

5) Announce overly-intricate contests.

6) Surprise management by announcing things that have not been cleared by them.

7) Make impromptu presentations.

Do more of this:

1) **Rehearse your presentation.** Tape record yourself and play it back. Video is even better than audio for this rehearsal. If you doze off during the replay, you know that the presentation needs a little more energy!

Mentally multiply the number of people in the audience by at least $25.00/hour. You often are playing to a very expensive audience. Treat them as such and your presentation will be crisp and impactful.

2) **Double-check your facts.** Make sure the distributor's computer is loaded with the right prices **before** you take the podium. Check inventories and other routine items to avoid the need to digress from your prepared message to deal with surprises.

3) **Make it a practice to deliver exciting presentations.** Deal separately with basic questions such as vintage release dates and remaining inventories, etc. Do not put people to sleep during your nine-minute presentation.

4) **Utilize your personal talents.** Jack Jalenko, now with B.R. Cohn Winery, once sang his Jekel Winery presentation and accompanied himself on the banjo! It was fabulous and he had 100% attention from the audience. Bernie Ryan, who works the Northwest U.S. for the Wine Alliance, and Jim Fiolek with Brander Winery, are talented stand-up comics who use their abilities to good advantage.

Few of us have their gifts, but develop the gifts you have and give yourself space! The audience will love it!

5) **Remember that promotions have a three-fold purpose:** They excite, educate, and reward. If you leave out any of these steps, your promotion fails and you lose your audience for the next time.

Example: You want to double sales.

First, get the audience excited about the idea of doubling sales, by translating this into terms they understand and care about. The obvious example is increased commissions. A fringe benefit is that the average order size is increased, so the customer doesn't have to delay the orders waiting until more items are needed. Another benefit is expanding visibility in their accounts.

Second, show them how to translate this excitement into results. This amounts to teaching sales and marketing in bite-size increments. Walk them through the tactical approach you have in mind. Show them how you have paved the way for success by anticipating their needs. Show them how well-coordinated the plan is. Show them how they can succeed.

Third, reward them for making the effort. Be sure the reward builds teamwork. Avoid prizes that tear the sales force apart by encouraging envy. Teams, not quarterbacks, win football games; treat your sales organization accordingly.

6) **Stay calm and collected under stress.** Watch televised news to see how people handle tough questions under pressure.

7) **Read the books:** ***How to be Prepared to Think on Your Feet*** by Stephen C. Rafe, publisher: Harper Business; and ***Staying Well with the Gentle Art of Verbal Self-Defense*** by Suzette Haden Elgin, publisher: Prentice Hall.

After reading these books, you will be delighted how your delivery improves and how much more skillfully you can deflect complainers and malcontents.

8) **Take a public speaking course.**

9) **Make presentations only when you have something to say,** not just because "it has been a while."

If you do these things it is likely that your distributors will say, "You want only nine minutes? You can have 20!" ■

Dan Wilson of Innovative Wine Marketing (IWM), Inc., publishes a monthly "Scorecard" newsletter and the "Scorecard Restaurant Report". IWM offers consulting in customer development, communications, networking, and brand strength analysis. Contact: Dan Wilson, IWM, Inc., 7832 Sea Breeze Dr., Huntington Beach, CA 92648; tel: 714/960-1369, fax: 714/960-5970.

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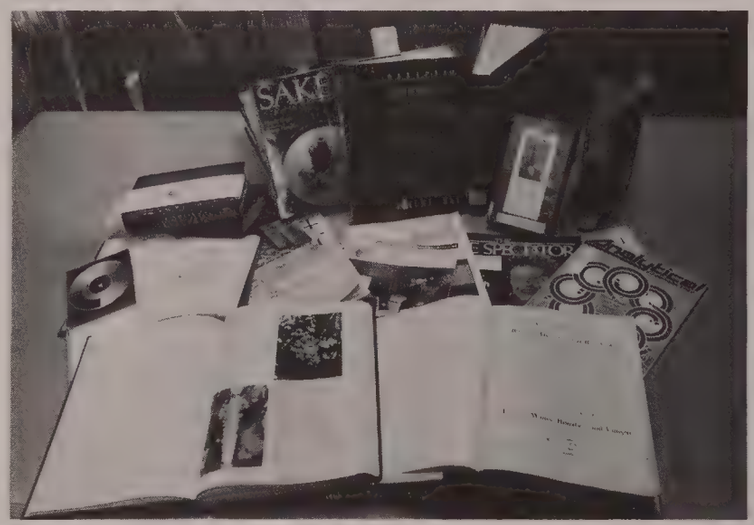
WINE LIBRARIES OF CALIFORNIA

By Bo Simons

Want to find out about pesticide toxicity, pore over Robert Mondavi's personal recollections, browse through pre-Prohibition wine labels, have the sensual thrill of holding wine books half a millenium old, or search for current journal citations on a laser-read database? These and other experiences await you in five California libraries which prove useful to a working winemaker or grape grower. Each collection, developed for differing reasons, serves various clienteles, and offers divergent challenges and rewards to users.

University of California, Davis

The enlarged Shields Library contains a massive and comprehensive wine collection. The oldest and the largest library included in this report, Davis' wine collection developed over the years to support the university's teaching and research in viticulture and enology. Maynard Amerine, Professor Emeritus, who is both a wineman and a renowned bibliographer, has been instrumental in building the UC Davis wine collection.



Davis is the only library which claims the Research Library Group's highest level of collection development, a Level Five, for viticulture and enology. It contains 20,000 volumes dealing with wine, including both books and large backfiles of bound volumes of almost 150 periodicals related to wine. There are 29 languages represented in the collection.

The collection also has maps, printed ephemera, labels, and archives. All materials dealing with wine from various parts of the old library have been relocated in one place, the Viticulture and Enology Room, in the newly redesigned library. About ⅓ of the collection, the older, rare, and archival materials, are housed in the Dept. of Special Collections.

Axel Borg, the library wine bibliographer, describes the whole collection and especially Special Collections as similiar to a fieldstone wall, "the stones of this wall being the great collections which the library has acquired over a period of time." These field-stones include part of the Gustave Niebaum collection from the Inglenook Winery, the library of the California State Board of Viticultural Commissioners, the private collection of Count Egon Corti, and other impressive collections.

Another great fieldstone is the archival material of the Bureau of Alcohol, Tobacco & Firearms, covering the period from beginning of Prohibition through the mid-1950s and comprising 132 archival file boxes. A new arrival to Davis is one of the Special Collections' oldest treasures. It is a rare delicate book, ***Devis Sur Le Vigne***, by Jacques Gohorry, 1549, perhaps the first book on wine written in French.

Most of the books in the collection are neither old nor rare. Davis boasts one of the most current and comprehensive collections on grape growing and winemaking in the world. Librarians and faculty help select new works, and book scouts and agents are employed in foreign countries to specifically look for new works on wine. "Being a Level Five library means we collect everything: the good, the bad, and the ugly," says Borg.

The collection, except for some of the items in Special Collections, is catalogued and arranged on the shelf according to Library of Congress classification. The card catalog has been supplemented by MELVYL™ the University of California's computer library catalog. You can use any of the library's many terminals, or you can search it from any computer hooked up by telephone line through a modem. This service is provided free to anyone in California; contact Axel Borg (916/752-6176).

Records of the Davis collection are included in several Union Lists or Bibliographic Utilities, with most of their records appearing on Research Libraries Information Network (RLIN). That means that most libraries can find out whether Davis owns a certain book and can order it for you through inter-library loan.

In addition to its MELVYL catalog, Davis has some other high-tech information products including several CD-ROM databases which index scientific and agricultural periodical literature.

Napa Valley Wine Library

The library, housed in the St. Helena Public Library, was started by James Beard, M.F.K. Fisher, Frances Gould, and others to preserve the treasures of local history and provide a wine appreciation and gastronomy collection. The Napa Valley Wine Library Association buys most of the wine books and keeps them in the St. Helena Library under an agreement with the city. To purchase books the Association raises funds by sponsoring tastings, wine appreciation courses, and by publishing a quarterly journal.

The wine holdings of the library consist of 3,000 titles in 6,500 volumes and subscriptions to several dozen periodicals. The collection, rich in rare old wine books, centers on gastronomy and the history of wine.

The local history of the Napa Valley receives special attention. Such Napa wine individuals as Andre Tchelistcheff and Brother Timothy have been interviewed by trained researchers as part of an oral history program. These interviews have been transcribed, indexed, printed, and are available in the library.

More information on local wine history resides in folders in the file cabinets (called 'vertical files' in library jargon) and in carefully maintained notebooks which include photographs and labels of area wineries.

The collection is cataloged, and you can access the records through the card catalog. Most of the holdings are included in a bibliographic utility called Online Computer Library Center (OCLC). This means that — as with Davis — there is a good chance your local library can find out whether the Napa Valley Wine Library owns a particular book. You may then

request it through inter-library loan.

The collection is arranged on the shelf by the Dewey Decimal Classification system. Library workers, from Director Clayla Davis on down, are happy to help you locate materials and will answer short reference questions over the phone. The books and much of the ephemeral material are property of the Napa Valley Wine Library Association, and the paid staff may not be familiar with all the wine materials, nor are they necessarily subject experts on wine.

Wine Institute Library

This library is dedicated to serving the needs of the members and staff of the Wine Institute office in San Francisco, CA. Organized in 1934 to help get the California wine industry back on its feet after Prohibition, the Wine Institute served as a clearinghouse for technical information within the industry, and its library concentrated on technical and marketing aspects of wine.

In recent years the Institute has refocused its energies more towards enhancing the environment for the responsible consumption and enjoyment of wine, and the collection reflects those changes.

Leon Adams, author of *Wines of America*, helped organize the collection, which now consists of 3,000 cataloged books and subscriptions to over 200 periodicals and newsletters.

A special strength of the collection is the history of the wine industry in California. It also contains some 18th and 19th Century French titles from the Sutro Collection.

There are also historical files packed with detailed clippings; promotional and historical materials on individual California wineries; folders on technical, legal, and marketing topics; and a label collection, especially strong in Pre-Prohibition and immediate Post-Repeal California labels. A collection of wine videos is being developed.

The books are cataloged and arranged on the shelf by Dewey Decimal Classification. The holdings may be searched only through their catalog and may not be checked out. Unlike any of the other libraries in this report, records of the books do not appear on any union catalog or bibliographic utility, and items are not available for inter-library loan.

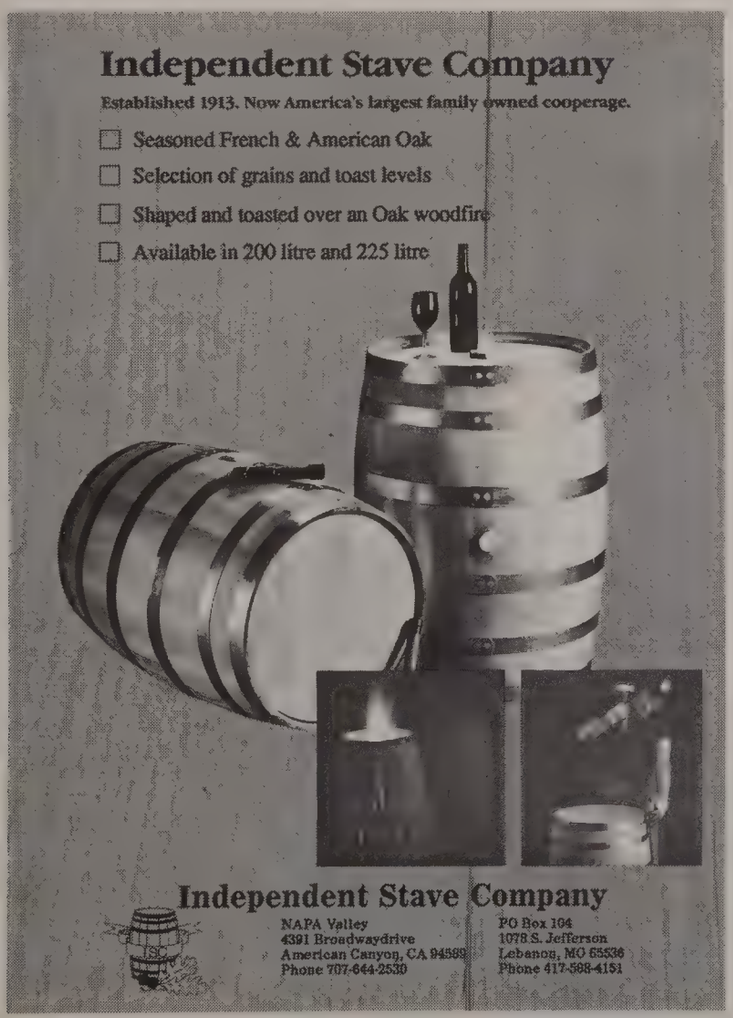
This library also exists for the use of writers and researchers working on material for publication. Pat McKelvey and staff are happy to answer short reference questions over the phone or refer callers to the appropriate source. Use of the library is by appointment only.

California State University, Fresno

There are two wine collections. The Special Collections of the Henry Madden Library has one of the finest collections of pre-Prohibition works on wine, while out in the departmental library of the Viticulture and Enology Research Center, there is a working technical collection.

Special Collections, HenryMaddenLibrary

Many of the viticulture and enology materials in Special Collections were collected by a private individual, Roy Brady, and acquired by CSU Fresno in 1968. The collection has been supplemented since by Ron Mahoney, Head of Special Collections, and currently consists of 2,500 books, 3,000 pamphlets and other non-book items, 900 wine merchants catalogs, 200 volumes of periodicals, and 200 restaurant wine lists.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UC DAVIS-SHIELDS LIBRARY University of California, Davis, CA 95616 (916) 752-6196 Axel Borg, or any Bio-Ag Department librarian HOURS: M-TH 8-12 F 8-6 SA 10-6 SU 12-12	20,000 volumes	150	Library of Congress	Department of Special Collections has BATF materials, California State Viticultural Commissioners Library, Niebaum Library	Online computer catalog with remote dial-up access	Yes–in person/on phone when Bio-AgDept. is staffed	Yes	No
NAPA VALLEY WINE LIBRARY St. Helena Public Library, 1492 Library Lane St. Helena, CA 94574 TEL: (707) 963-5245/ FAX: (707) 963-5264 Clayla Davis, Patricia Rogers, or any librarian HOURS: M 12-9 T-F 9-6 W 9-9 SA 10-4	6,500 volumes 3,000 titles	50	Dewey Decimal	Local History of Napa Valley, Oral Histories of famous Napans, labels, binders on local wineries	Card Catalog	Yes–in person/on phone limited by available staff	Yes	Yes- to other libraries only
WINE INSTITUTE LIBRARY 425 Market St., Suite 1000, San Francisco, CA 94105 TEL: (415) 512-0151/ FAX: (415) 442-0742 Pat McKelvey HOURS: M-F 9-5 appointment required	3,000 volumes	200	Dewey Decimal	Files on member California wineries, label collections, technical file, legal & marketing materials	Card Catalog	Yes–in person/on phone WI members / some others	No	Yes- to WI members / others
CALIFORNIA STATE UNIVERSITY, FRESNO Department of Special Collections Henry Madden Library, 5200 North Barton Fresno, CA 93740 (209) 278-2595 Ron Mahoney HOURS: M-F 10-5 appointment suggested	2,500 books 200 volumes of mags 3,000 pamphlets	None current	Library of Congress	Pre-Prohibition history of wine in America, wine lists, EPHEMERA includes labels and wine lists	Card Catalog	Yes–in person/ limited phone	No	No
CALIFORNIA STATE UNIVERSITY, FRESNO Viticulture and Enology Research Center Library 2360 East Barstow, Fresno, CA 93740-0115 (209) 278-2089 HOURS: M-F 8-5 (by appointment) W 1-5, F 8-10,1-5 (drop-in)	500 volumes	50	Library of Congress	Research on viticulture and enology sponsored by VERC; CSU Fresno wine theses.	Card Catalog	Yes–in person/ on phone	Yes	No
SONOMA COUNTRY WINE LIBRARY Healdsburg Regional Library 139 Piper St., Healdsburg, CA 95448 TEL: (707) 433-3772 / FAX: (707) 433-7946 Bo Simons, or any librarian HOURS: M-TH 9:30-9 F-SA 9:30-6	3,000 volumes 1,500 titles	75	Dewey Decimal	Wine information files, Sonoma Co.,wine history, science, technology, business and legal aspects of wine	Online computer catalog remote dial-up access soon	Yes–in person/	Yes	Yes

Nearly 70% of the titles listed by Liberty Hyde Bailey in the bibliography of early viticulture in his ***Sketch of the Evolution of Our Native Fruits*** (1898), are represented plus many titles he missed. The remarkable depth of the collection is evidenced by two editions of an important early work, ***Bacco in Toscano*** by Francesco Redi. Thomas Pinney, a respected wine historian, extensively used Fresno's collections for his recent book, ***A History of Wine in America.***

Most of the books in the collection are cataloged and these holdings are reflected in the Special Collections card catalog and in the departmental shelf list. Arranged by Library of Congress classification, the regular subject headings of that classification system have been supplemented so that searchers can readily find books about winemaking in Medoc, for example.

Many of the holdings are also reflected in the bibliographic utility of OCLC (Online Computer Library Center), and your local library can learn whether Fresno owns a particular work. The materials, however, do not circulate, nor are they available on inter-library loan. Qualified researchers may access the materials by going to Fresno.

Viticulture & Enology Research Center

The other half of CSU Fresno's wine collections' split personality is the Viticulture & Enology Research Center (VERC). VERC is an independent research facility associated with the university and reflects CSU Fresno's spirit of practicality. It was started by Professor Vincent Petrucci, the current director. Supported entirely by contributions from alumni and the companies they are associated with, VERC actively pursues research in viticulture and enology and uses its library to support this function.

Various staff help maintain the functional and spartan library. There are approximately 500 books, including theses, technical reports, and subscriptions to about 50 periodicals. The collection, classified by Library of Congress classification, may be searched through the card catalog. VERC's library's holdings are reflected on the bibliographic utility of the Online Computer Library Center and are available for inter-library loan.

Used primarily by students, faculty, and local industry, the library is open to anyone by appointment, and is staffed by a student assistant 10 hours/week. Staff will be happy to try to answer short reference questions over the phone. There are plans for a new, much larger facility which should be completed in late 1991 or 1992.

Sonoma County Wine Library

The Sonoma County Wine Library is the newest wine library in California. If Davis is the academic pinnacle of wine libraries and CSU Fresno's VERC the essence of a pared-down practical library, then Sonoma is both a practical working technical library to the area's wine industry and a collection that has some depth and resonance to its collections. It also reflects some of the Napa Valley Wine Library elegance in its historical collection as well

as the savvy of the Wine Institute collection in its coverage of wine marketing and legal issues.

The idea for the library germinated in the 1970s with the formation of the Russian River Wine Road, a group of area wineries that banded together to share resources. The idea bore fruit in November 1988, when the library opened as part of the new Regional Library in Healdsburg, CA.

Mildred Howie, founder of the Russian River Wine Road, organized wine industry support for the library's formation and won over David Sabsay, Director of the Sonoma County Public Library, to help develop a framework for the public library to handle private support.

This library is an unusual private/public joint venture. Supported in part by the area wine industry and run by the public library, it serves as a business and technical library as well as a repository for Sonoma County wine history. Companies can be subscriber/contributors to the library and individuals can show their support by joining the Sonoma County Wine Library Association.

The library puts major emphasis on periodicals, the most current source of information. There are subscriptions to over 70 magazines and journals covering all aspects of wine, from microbiology to marketing, in several languages.

The book collection includes 3,000 volumes representing some 2,000 titles covering all aspects of wine. Several years ago the Vintners Club in San Francisco put its 1,000 volume library on the market. The Sonoma County Library, with the help of the Sonoma County Wine Library Association, was able to buy it. Among the treasures in the Vintners Club Collection is a 1656 law, "limiting and setling (sic) the price of wine," passed by one of Oliver Cromwell's parliaments.

The library has added to these rare books through considered and deliberate collection building. Agoston Haraszthy's ***Grape Culture, Wines and Winemaking*** (1862) and Columella's ***Libri de Re Rustica*** (1514) are two additions to the collection.

Supplementing these historic books are many technical works, modern texts, marketing surveys, and technical reports. There is a growing pamphlet file called the Wine Information File, and several CD-ROM databases. The CD-ROM databases and the catalog of the books are accessible from a computer workstation at the library's entrance.

The collection is cataloged, arranged on the shelf by Dewey Decimal Classification and searchable online through the County Library's new online public access catalog, to be available soon in dial-up mode. The holdings are reflected on Online Computer Library Center and are available for inter-library loan (except rare or reference items).

Reference help is available whenever the library is open. Phone reference and fax service are available.

Using these libraries

As mentioned above, you may access the libraries' collections by visiting them, and in some instances, remotely by computer and/or inter-library loan.

Napa, Wine Institute, and Sonoma, with varying restrictions, are all able to fax materials. The accompanying chart should help with names, addresses, hours, services, and major features of the libraries. A video tour of these libraries is available from the Sonoma County Wine Library.■

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* For information on how to order a complete set of tapes from the National Conference, call (415) 851-2319.

Forget share of market; go for share of mind

By J. Conrad Leninson

Many wineries aim for a large share of market. This is a noble effort in that there is nobility in honest profits. But if share of market is your primary aim, you are aiming at a tough-to-hit target.

Your winery will obtain that share of market if you aim in a different direction. Guerrilla marketers know that they will gain share of market if they first aim to get share of **mind**. That means wine purchasers not only thinking of your brand, but they think of it **first** when purchasing wine.

You can get that share of mind by diligent use of the media, and through consistent direct marketing efforts in retail stores, restaurants, and the mail. You get top-of-the-mind awareness with your commitment to a marketing plan and by your comprehension of the power of **repetition**.

Companies that have gone to the bank by employing this concept include: Pillsbury, Green Giant, Maytag, Marlboro, Allstate, and Kellogg. I mention these companies because their basic marketing theme has run unchanged for 30 to 50 years. They aimed for share of mind and won it. After all, don't you remember the doughboy, jolly big guy, lonely repairman, cowboy, the good hands, and Tony the Tiger?

Regardless of the cost or quality of your wines, it is unrealistic to think that one dynamite ad can beautify your bottom line. All it can really do is give you a handhold — probably not even a firm one — in your prospect's minds. That's not a bad thing; that's good. Another little ad followed by others will solidfy your handhold, intensify your share of mind.

If you can provide enough repetition of your winery name, identity, and overall value, you will eventually secure a healthy share of mind. You can provide such repetition through signs, mailings, phone calls, commercials, billboards, trade show displays, brochures, and other weapons of guerrilla marketing, and especially through relationships with retail buyers.

You can get those relationships with constant attention, little gifts like tickets to the ballgame, giving proof by your actions that the buyer is important to your winery. Ask if there is anything else you can do to make the buyer's life easier? Listen carefully, then respond in action to the words spoken.

Once you've got share of mind — which is easy to spot by an increase in your share of market — make special offers and announcements. Watch that market share rise even more. Share of mind comes from publicity and advertising; from everything you say or do about your winery and the buyer's business. Learn other tactics that other buyers have used and share those ideas with the buyers on your list.

If you do something, or someone spreads unfavorable news about their experience with your winery, that, too, contributes to your share of mind. So you've got to knock yourself out, not only gaining share of mind, but doing all that is humanly possible to be sure it is positive and translates itself into share of market.

Though share-of-mind marketing doesn't require a lot of money, results require a period of time. But the wait is well worth it — share of mind is omnipotent in controlling purchase behavior, which becomes share of market for your winery.

It is crucial that there is cohesion in all of your marketing to gain this share of mind. Yoru letters, signs, ads, comments to the buyer, boxes, labels — all must go for the same goal. Clarity is your ally in gaining a cohesive identity. Be sure all materials say the same thing.

Too many wineries go straight for the jugular, when it is the brain at which they should direct their attentions. Guerrillas with limited budgets know that they need not spend big to gain big results. They just have to be sure they're aiming at the right target and that they are consistent with their message. Plus — they must know the power of repetition.

Wineries that aim for share of mind are careful not to drop from view for extended periods, or that coveted share of **market**, for which they also strive, will never be secured. It is simple to understand the necessity of gaining a share of mind. But it takes a patient vintner to practicetheprinciples. ■

(Jay Contrad Levenson is the author of GUERRILLA MARKETING, and other business books, and THE GUERRILLA MARKETING NEWSLETTER. To order or obtain a free brochure, call 1-800/748-6444. In CA, call 415/381-8361.)

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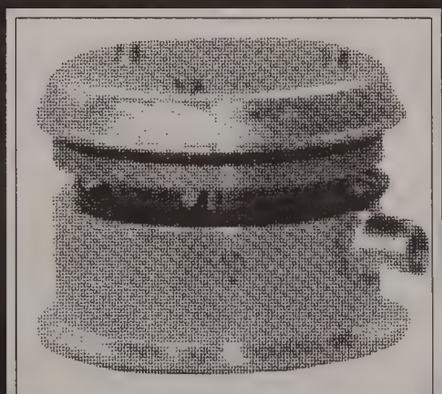

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CORRECTION

The July/August'91 **PWV** inadvertently omitted APM, Inc. as a supplier of corks and capsules in the Advertiser/Product Index. APM's ad was on page 48, not on page 2, as indicated in the Capsule Roundup on page 25. **PWV** apologizes for the error.

PRINTER'S APOLOGY

Dear **PWV** *Subscriber:*

As the printer of this publication, we would like to extend a sincere apology for our mistake with the July/August'91-**PWV**. It was our error that **PWV** was not 3-hole drilled as you are accustomed. We apologize for this inconvenience, and assure you that we will make every effort to guarantee this does not happen again. Thank you for supporting **PWV**, and for your patience and understanding in this manner. If you require a 3-hole drilled copy of the July/August'91-**PWV**, please call or write **PWV** and a drilled copy will be mailed to you as long as copies last.

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Commonsense Book of Wine
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371pp—$42.95 Order #659

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Emile Peynaud
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Jancis Robinson
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Viticulture, Vol. I Resources in Australia
B.G. Coombe, P.R. Dry
211pp—$35.00 Order #AIP-VIT-I

Wines and Winelands of France, "Geological Studies"
Charles Pomerol, editor
370pp—$45.00 Order #6599

A Wine Grower's Guide
Philip Wagner
225pp-$19.95 Order #546

Winegrowing In Eastern America
Lucy Morton
217pp—$24.95 Order #923

Wine Proceedings 2000 — Australia
Proceedings of Wine 2000 Conference, Adelaide, Australia, August, 1989. 23 authors on Wine and Health; Wine Industry as a Corporate Entity; Interaction with Government; Grape Supply Issues; Production Economics; Marketing Distribution.
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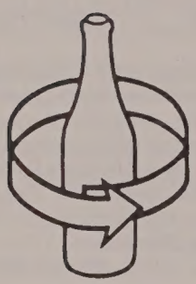

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Independent Stave is a third-generation cooperage. Total commitment to our customers' satisfaction has made us the largest barrel producer in the world.

- We offer:
- French oak and American oak of the finest quality.
- Shaping and toasting over an open oak wood fire.
- Selection of grain coarseness and toast levels.
- 200 and 225 liter barrel capacity.

Check our cooperage rates and find out how much money you can save!
Let **Independent Stave** fill your French oak and American oak wine barrel needs.

Independent Stave Company

1078 S. Jefferson, PO Box 104, Lebanon, MO 65536 • **417/588-4151**
4391 Broadway Dr., American Canyon, CA 94589 • **707/644-2530**

Wine East

Keep up-to-date with the grape and wine industry in Eastern North America!

With more than 525 wineries and more than 80 percent of the U.S. Senate located between the Rocky Mountains and the Atlantic Coast, wine professionals and alert consumers are discovering the importance of keeping informed about this rapidly expanding wine region. Published bi-monthly, *Wine East* contains in-depth features on wine-making, grape growing and marketing; research updates, news events; and a responsible editorial viewpoint on political and social issues related to the wine industry.

Subscription rate: $18.00 for one year ($26.00 in Canada and overseas, payable in U.S. funds). Sample copy free upon request.

L & H Photojournalism
620 North Pine Street
Lancaster, PA 17603

Eastern Wine Publications

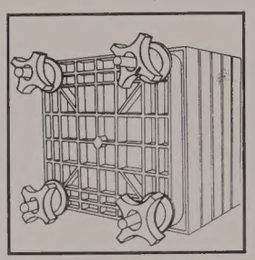
MARCON FILTERS

FILTER SYSTEMS FROM 3 TO 21 PLATES (SIZE 8″×8″)

All models can use pads or reusable membranes.

D.E. plates available

Plates may be purchased separately with a free paper template for "do-it-yourself" frame.



Tangential Flow systems available.
Pilot systems from $130 U.S. FOB Downsview

40 Beverly Hills Dr., Downsview, Ont. CANADA M3L 1A1 (416) 248-8484

Winery Software

Winery Production Management System

Eleven years experience computerizing bulk wine record-keeping on personal computers has made us a leader in the field. Our system uses MS/DOS and requires a hard disk. The system includes the following functions:

- Easily providing a complete trace for a wine-lot back to weight tags. (Great for a BATF audit.)
- Supplying the cellar with information to manage the bulk wine inventory.
- Providing management with bulk wine summary and cost reports.
- Easily producing the monthly BATF-#702 form with an audit listing of all entrances and exits to the bulk wine system.

Our commitment is to provide wineries with the best in affordable computerized bulk wine management and to support our clients in the implementation and continued use of this system.

Data Consulting Associates
18000 Coleman Valley Road, Occidental, CA 95465
707/874-3067

BARREL BUILDERS

SALES DIVISION
1-800-365-8231
(707)942-4291
FAX (707) 942-5426

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American Oak Barrels

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The Pursuit of Quality

One from the Heart

Your champagne is like a fine romance.

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It falls to you to capture the magic for lovers to enjoy. One straight from the heart.

Only you can bottle the essence of romance.

And only one cork can capture the lover's secret - SPARK.

Only the natural stopper grown from the soil that is the heritage of your grape can preserve the original character of your champagne. The sculptor's discs which kiss the wine but leave no memory.

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